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**A critical appraisal of the inter-relationship of the
tourism industry and the wine industry. An analysis of
wine tourism on the Granite Belt area in Queensland,
Australia.**

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Statement of Original Authorship

I, Catherine Margaret Thomas, hereby state that the work contained in this thesis has not previously been submitted for assessment, either in part or in whole, by either myself or any other student at either The University of Queensland or any other tertiary institution. To the best of my knowledge and belief, the thesis contains no material which has been previously published or written by another person except where due reference is made. I make this statement in full knowledge of and understanding that, should it be found false, I will be subject to disciplinary action under Statute No 13 and the Examination Rules of the University of Queensland.

C. M. Thomas

Catherine M Thomas

Date: 23/01/04.

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Abstract

This research was a critical appraisal of the inter-relationship of the tourism industry and the wine industry in the Granite Belt area of Queensland, Australia. The thesis analyses the correlation between the two industries and how these links can be strengthened to the benefit of both industries.

The tourism industry and the wine industry were surveyed utilising structured interviews and analysed using the 'correlation research' method. The sample for the tourism industry was tourism association managers and the sample for the wine industry was the forty wine operations in the region that were open in winter 2003. Of the forty wine operations, 100% were involved in some of the information collected, and 75% were involved in the whole interview.

The key findings were in relation to the lifestyle choice of wine operators to go into the business of wine tourism. The majority of wine operators had limited knowledge of the tourism and hospitality industries and most were unprofessional in standards of service and recognising general tourist needs. Limited market research has been completed by any of the wine operators, for example, they had not surveyed such issues as their client's needs, ages, gender, or occupational background.

The recommendations covered areas such as:

- The need for better signage on the wine tourism trail, through to education and training for wine tourism personnel, including better wine tours within an establishment;

- The need for wine operators to market and promote correct information, and to run their operation/s as a tourist business;
- The broader need for regional and government tourism bodies, local industries and organisations to work together, thus creating a professional and consistent standard in promotion and marketing that will enhance the whole district;
- The need for the opening of a wine centre which employs a person/s to promote all the wine operations, including a knowledge of wines, grapes, the district and all the wine operations;
- The need for more varied styles of restaurants and cafes to be opened within the district; and
- The need for attractions and activities at wine venues that cater for non wine drinkers, such as children and drivers, as these tourists also visit wine operations with family and friends and this could create a positive outcome for the district.

The thesis recommends that future research examines the needs of the tourist within the district. This should not only include information such as the wine tourists' age, gender and occupation and why they have chosen to visit the region known as the Granite Belt, but also the desires of groups such as families and tourists with special needs and a survey to elicit whether they are really being catered for in the wine tourism industry on the Granite Belt.

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Chapter 1

Introduction - Tourism and Wine - A symbiotic relationship

The purpose of this research is to examine the relationship between the tourism industry and the wine industry in the region known as the Granite Belt, what correlation exists between the two industries, and whether links be strengthened to benefit both? This study examines future directions in tourism relevant to wineries, thus developing further the concept of wine tourism. If both industries work closer together, this will create flow on effects to rural communities and increase regional tourism in many parts of the world.

The writer examines the correlation between the tourism industry and the wine industry within the Granite Belt region of South East Queensland. The research will explore the possibility of creating positive economic impacts which can enhance the local region to the benefit of both industries and the community in general.

The Australian wine industry's strategic plan, Strategy 2025 (1996) identified wine tourism as a key opportunity for increasing wine profitability. Specifically, Strategy 17 sought to "Capitalise on wine tourism opportunities by stimulating wine tourism and improving the profitability for wineries" (Devins, Ernst, Young, Strachman, et; 1999).

The region known as the Granite Belt in Queensland was chosen by the writer because numerous new wineries are opening up, tourism within the area is increasing and the writer has close personal knowledge and access to the area.

The Granite Belt

'The forming of the character of Stanthorpe and the Granite Belt goes back to remote times, when magma formed some of the huge and ancient batholiths of granite which we know today, and at the same time dictated what minerals would be present, and what the

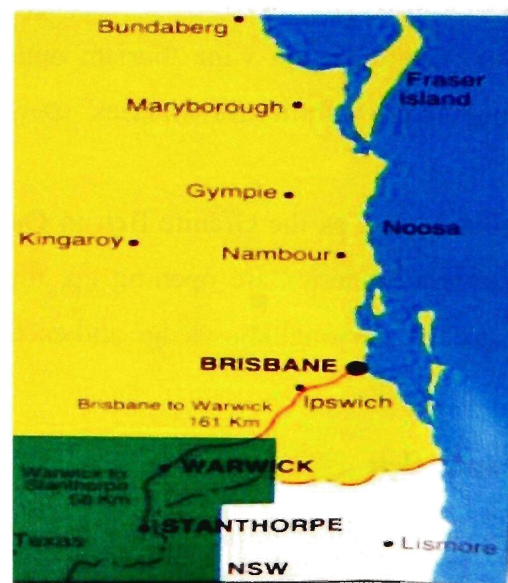
soil characteristics would be. Furthermore the district's elevation was created. Over very recent periods, man and his activities have shaped Stanthorpe's present character. Firstly the minerals present, the finding of which gave the greatest single impetus to the area and established populations far in excess of those that could be expected from grazing pursuits. Secondly the elevation, producing a cool summer climate, conducive to the production of fruit and vegetables, during a period of the year, that is largely too hot for their production in the rest of Queensland. These are major factors in our development' (Harslett & Royle 1972).

The Granite Belt centres around the town of Stanthorpe. Stanthorpe is situated 220kms south west of Brisbane (Queensland's capital) and 809kms north-west of Sydney (New South Wales' capital). Stanthorpe is approximately 2 ½ hours drive by car or coach from Brisbane, is situated 811 metres above sea level and is amongst the highest towns in Queensland (Webster 1996). This elevation gives rise to four real seasons, and is a little cooler in summer than the rest of Queensland. The Granite Belt district is known as the coldest place in Queensland, due to its altitude and proximity to its southern border.

Map 1.1 – Map of Queensland with the South East highlighted showing the regions.
Map 1.2 -Where the Granite Belt is situated in regards to the QLD and NSW border.



Source: Tourism Queensland 2003
Map 1.1



Source: Beautiful Southern Downs 1990
Map 1.2

Map 1.3 -The Granite Belt



1.2 Source: The Granite Belt Brochure 1997

The Granite Belt is a region of vast contrasts, from vineyards to National Parks, vast changes in many of the land formations, rocky outcrops to flat pastoral lands. The Granite Belt covers many small townships, with farm lands of cattle, sheep, goats, vegetables, fruit and grapes. The area of the Granite Belt in regards to Queensland is presented in Map 1.2. Map 1.3 covers the actual area of the Granite Belt, and sets out the writer's definition and perimeter of the area that is known as the Granite Belt.

Stanthorpe Shire covers the main area of the Granite Belt; only two national parks, and the towns of Cottonvale and Dalveen do not fall within the Shire's boundaries. The Shire encompasses 2669 square kilometres. The Shire is in the Federal Electorate of Maranoa, and the State Electorate of Warwick (Shire of Stanthorpe 1996/97). Stanthorpe is the commercial centre of the Granite Belt with a population of five thousand (5000) people and services an outer community of a further ten thousand (10 000) people.

The Granite Belt is a natural land formation that commences from Dalveen (a small village in Queensland) through to Wallangarra, on the Queensland border with New South Wales, as shown on Map 1.3. The Granite Belt is part of the ranges (mountains) that separate Queensland from New South Wales. The area of land includes four (4) National Parks - Girraween; Bald Rock; Sundown and Boonoo Boonoo.

The Granite Belt has been described by Meek as follows; 'The southern part of the Granite Belt, adjoining the New South Wales border, is particularly rugged country in that boulders there are larger and more numerous than elsewhere in the region and some of its mountains consist mainly of bare exposed rock. In some places creeks in the area run through clean deep channels in the granite..... Not far west of Stanthorpe, where the land slopes down, the Granite Belt with its orchards gives way abruptly to trap rock country. This is more open, with small flinty stones - not boulders - on its ridges and has different vegetation. It is well grassed and therefore good for grazing.....Pastoral properties there are among the oldest in Queensland' (Meek 1991).

The Granite Belt was discovered by Allan Cunningham in 1827, and was utilised as a pastoral area. In 1857, Stanthorpe started as an isolated coaching station (Webster 1996). In 1872 tin was discovered, this continued in a large way until 1887, and with the decline of the tin industry, the fruit industry started. Grazing continued throughout this time as it still does today (Harslett & Royce 1972).

With the arrival of Fr.Jerome Davadi from Italy in the early 1870s, he encouraged agriculture, especially that of the vine in the area of Stanthorpe for over 30 years. Father

Davadi was sometimes referred to as ‘Father of the Fruit Industry.’ ‘He encouraged diversification, he was able to foresee the problems of the settlers as the tin petered out,’ and encouraged fruit plantings. He brought with him from his homeland of Italy, the knowledge and culture of vineyards and the making of wine. He planted vineyards and orchards in numerous areas and also assisted his parishioners with cuttings from his plantings (Harslett & Royle 1972).

Many of the immigrants in the area were Irish due to the immigration of the times, this changed with the Soldier Settlement Scheme after World War I, and with the immigration of the Italian settlers in the 1920s.

Many of the names of the towns within the Granite Belt area ‘were taken from battlefields of World War I where the AIF had fought’ (Meek 1991). ‘The Soldier Settlement Scheme had first been proposed by the Federal Government in 1915 to plan ahead for the end of the war when returning soldiers would be seeking employment. The idea of giving them work on the land which would be useful, productive and hopefully provide a healthy life-style seemed a good one. Many of the soldier settlers were not fortunate enough to succeed on their farms. They were nearly all inexperienced, but after the hell of war I think they felt the call of the wild, and the freedom from the army yoke as much as anything else’ (Meek 1991).

Between 1920 and 1922, ‘the settling of seven hundred soldier settlement personnel, with increased staff, settlers money from repatriation and large Government sums expended on administration and the preparation of 30 000 acres for the scheme brought a business stimulus to the district. Ironically many walked off their properties, wiser and poorer for the experience, but the money circulated, and coupled with a small increase in wool prices, these circumstances were instrumental in carrying the district over another lean period of depression years’ (Harslett & Royle 1972).

With the Italian settlers in the 1920s, the beginning of viticulture began on the Granite Belt, some were experienced viticultural personnel, others learning as they went along.

Most of the wine was produced for family and friends' consumption, but during the later part of the depression years in the 1930s 'a great deal of casked unfortified wine left the Granite Belt by rail for the northern cane fields. The emergence of the present fine table wine operations on the Granite Belt didn't occur until the late 1960s' (Moran 1993).

The main industries for the Shire are Fruit and Vegetable Growing; Sheep and Cattle Grazing; Winemaking and Tourism (Shire of Stanthorpe 1996/97). As with many farming areas, seasonal work such as the picking of fruit, packing fruit, cattle work, etc., is available and this has the effect of hiding true levels of unemployment. Both the long term and seasonal unemployment is about 2 percent of the population, therefore it is an area that does without many grants and programmes to help the unemployed.

The Shire is multi-cultural. With the immigration of Europeans after both the First and Second World Wars, the fruit and wine industries started to prosper. The district relies on the weather for the main industries, and tourism can be greatly affected by changes within weather and climate patterns. The local economy is based on wool, cattle and the fruit industry, with the presence of wineries, all this has led towards the direction of tourism.

In the Shire many new farming ventures have been undertaken, and many farms have opened for farm stay holidays and bed and breakfast venues have appeared. The local restaurants and cafes are utilising the fresh local produce throughout the district, and designing menus to match the local wines.

The Granite Belt has both natural and man made attractions, from the National Parks, the dams, the lakes and the numerous scenic drives and walks, to farms, such as the berry farms that are becoming popular for farming and tourism alike. This study is focused on tourism and the wine industry, therefore the writer acknowledges the numerous attractions within the area, but will only focus on tourism and wineries for the purpose of this thesis.

Tourism

The Concise Oxford Dictionary gives the word 'tourism' as a noun of French derivation meaning 'organized touring; operation of tours as a business; provision of things and services that attracts tourists.' A tourist is a 'person who makes a tour, traveller, esp. for recreation,' as cited in Richardson (1995). 'The World Tourism Organisation defines tourism as 'the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes' (Richardson 1995).

For the purpose of this thesis a tourist is a person who travels to a place outside his/her normal living surrounds, this will include day visitors.

'In recent years, the tourism industry has experienced unprecedented growth and made a substantial contribution to the nation's economic development. It has matured into a prominent, sophisticated industry with the potential to play a significant role of securing our future prosperity' (Griffiths 1992).

'Tourism is one of the nation's biggest and fastest growing industries with the potential to generate major economic benefits for Australia' (Griffiths 1992). Within Australia there are many varied and different forms of tourism, whether this be Regional Tourism, Culinary Tourism, Eco-Tourism, Natural and Man Made Tourism are just some of the kinds of tourism that are within Australia, many of these forms overlap each other. 'Tourism at present creates one of every nine jobs within this country, either directly or in relationship to tourism. The expectation is that Tourism will grow to be double today's figures by the year 2012' (McDonald 1999 – Personal Communications).

The Granite Belt attracts both international and domestic tourists, but mainly the domestic tourist. Within Australia, 'domestic visitor numbers are almost always much higher than overseas visitor numbers.... At present, there are approximately 49 million

domestic holiday trips made every year, that is, approximately three trips for every Australian. In addition to the 49 million domestic holiday trips there are also 100 million day trips, made for leisure and recreation purposes' (Craig-Smith 1993).

Tourism encompasses many varied spheres of employment and related employment that continues to cascade throughout society (Healey 1997). The Australian workforce in 1988 had approximately 6 per cent in the tourism sector; this grew to nearly 7 per cent by 1993 - 94 (Craig-Smith 1993, Healey 1997). By the end of 2003 this is expected to be approximately 8 - 9 per cent (Healey 1997). The new jobs that are expected to be created within tourism are divided at approximately 36 percent to the hospitality sector, 23 per cent to the retail sector, 11 per cent to transportation and 30 per cent to built and natural tourism venues (Healey 1997).

'Tourism is already very important to regional Australia, and is predicted to continue to grow' (Braithwaite 2001). 'In 2000, the Australian Bureau of Statistics published the first Australian Tourism Satellite Account for the year 1997-98. The report defined the relative importance of tourism in Australia in relation to the standard national industries and determined that tourism-related activity contributed 4.5 per cent to national GDP' (Williams, Byron, Hurley 2001). 'Tourism also contributes significantly to employment and Australia's exports. In 2001-02 the tourism industry's share of total employment dropped slightly to 5.9%, after remaining at 6.0% since 1997-98. Tourism contributed 11.2% of total exports of goods and services in 2001-02. The tourism industry employed 549 000 person in 2001-02' (Australian Bureau of Statistics 2003).

With the visitors, spending occurs, then employment, then more spending from the workers, as well as the tourism industry in general. The flow on is continuous, and the whole country benefits.

'While tourism has been an economic factor in Australia for a long time, in recent times it has grown to the extent that it is now recognised as a major contributor to total economic activity. In particular, international tourism has experienced substantial growth in the

past decade or so. This has focused the need for improved standards of facilities and service, and has contributed to a recognition that tourism covers a sophisticated set of economic activities with great potential for future domestic and export earnings' (Australian Bureau of Statistics 2001).

For many years small pockets of tourism have existed in the Granite Belt area. A trickle of people, driving through, staying for a while, noticeable but not really recognised as the first tourists visiting the region. Stanthorpe Shire Council considers that the tourist industry in the Granite Belt area probably started with James Corvan, when the Government set parameters for Regional Tourist Associations in the 1970s. The region known as the Southern Downs consists of the towns of Warwick, Stanthorpe, Texas, Inglewood and Clifton.

In the early 1990s big changes occurred to tourism in the area, the short drive corridor concept emerged and the region was marketed as "a short drive from Brisbane, the Coast, etc." From very few accommodation units there are now 104 bed and breakfast establishments and 37 wineries (McMurtrie 2002).

In the year 2000, the value of tourism to the area was estimated between 25 - 30 million dollars per year. This estimate is based on the tourist expenditure which has fluctuated in the past few years between 25 and 30 million dollars. The Stanthorpe Shire Council estimates the financial impact on the Shire from tourism is between 35 to 40 million dollars a year.

With 35 - 40 million dollars expenditure, this has a direct impact on employment. The total direct jobs in tourism are seasonal and vary between 290 and 360. The total number of jobs that indirectly relate to tourism is between 370 to 460 jobs (McMurtrie 2002).

The benefits that are associated with tourism, whether this be the employment and/or the financial impact on the Stanthorpe Shire, tourism has become extremely important to the area and to the community in general. Tourism within the Stanthorpe Shire is mainly

based on domestic tourists. These are people who still enjoy the 'short drive', the cooler weather, and the many attractions and festivals.

Tourism as with any other industry has numerous bodies that govern it. The Southern Downs Tourist Association, sponsored by the Government and local Council, only represents tourism and hospitality venues that are current paying members. Other associations are smaller, such as the Granite Belt Tourist Association and represent the local town organisations. All associations are working towards the same ideas, but not working together.

The industry is generally in constant growth, but what do people want and how do people want it? Is wine a tourist product, are the regions set up for tourism, or are we only marketing our wines for the wine consumer? There are numerous ways one could look at enhancing tourism within this area. One way to boost the tourism industry would be via the local wine industry.

The Wine Industry

In Australia, vines were introduced with the First Fleet by Captain Arthur Phillip in 1788, and 'wine production was carried out by the English gentry in NSW, Victoria and South Australia for the first half century of settlement. The influx of European immigrants in the Gold Rushes of the 1860s and the accompanying waves of cultural migration by settlers such as the Silesians to the Barossa Valley provided the necessary skills to grow better quality grapes and make good wines' (Wine Online 2003).

Until the 1960s, the Australian wine industry was of no real commercial significance, mainly producing fortified wines to be utilised in spirit production (brandy). The Australian wine industry started booming in 1965. 'The 1960s and 1970s saw the introduction of improved technology in the wine industry, the planting of improved wine grape varieties, and a change to the quality of bottled wines generally recognised in Australia' (Jensen; Smith; et 1994).

Table 1.1 A summary of the Australian wine and grape industry today:-**THE AUSTRALIAN WINE INDUSTRY AT A GLANCE**

Snapshot	2001	2002	* (%)
Wineries	1 465	1 625	10.9%
Vineyard area ² (ha)	148 275	158 594	7.0%
Tonnes crushed (2002) vintage	1 391 082	1 649 574	18.6%
Beverage wine production (ML)	1 034.8	1 174.1	13.5%
Domestic sales (ML)	395.7	414.5	4.7%
Exports (ML)	375.1	471.4	25.7%
(A\$ million)	1 757	2 288.8	30.2%
(A\$/L)	4.69	4.86	3.6%
Imports (ML)	13.8	17.2	24.9%
(A\$ million)	105.6	134.7	27.5%
(A\$/L)	7.67	7.87	2.1%

Source: Australian Wine Online 2003

* % - Growth percentage within a year

Queensland wines are now enjoying national recognition as good quality, they are winning awards, and the export market is growing. The majority of expansion within the wineries in Queensland has happened in the last seven years (QLD State Development 2001).

The Granite Belt local wine industry commenced in the 1840s. ‘It was the Italian community which initiated the growth of the wine industry, following an influx of Italian migrants into the country after World War 1. This generated a demand for Vin Ordinaire, and led to the planting of wine grape varieties. The initial families of Zanatta and Puglisi were producing bulk wine in the late 1920s and early 1930s....’ (Jensen; Smith;et 1994). Many Italian families moved from North Queensland to the Stanthorpe area as it reminded them of home (Gangemi-nee Puglisi – personal communication 2002).

The area of the Granite Belt currently planted with wine grapes is 486 hectares. ‘The region crushes approximately 1000 tonnes of grapes each year...over the next few years production will grow to well over 4000 tonnes’ (QLD Gov State Development 2001).

Some definitions are required within the Granite Belt wine region of the terminology that will be utilised within the research paper. A vineyard is a block of land on which wine grapes are grown. A vineyard on its own does not particularly attract tourists, only when attached to a winery and/or cellar door does it become a point of interest to the wine tourist.

A winery is a facility which processes grapes into wine. The winery can be free standing or it might be attached to a vineyard and/or cellar door. A cellar door is a retail outlet for the sale of the wines from an individual establishment. A cellar door can be located on its own or attached to a vineyard and/or a winery. Vineyards, wineries and cellar doors can all operate individually but in the majority of cases, all three go together.

There are 44 wine operations within the Granite Belt region, but only 40 of these are on the Granite Belt within the parameters of Map 1.3, the others are over the border in New South Wales or further into Queensland at Toowoomba. The 40 wine operations are mainly family concerns; therefore the affect on the local employment rate is small. Only a few wine operations employ staff, and these rates are so low that the actual percentages are of no real value. Some of the grapes for the wineries are grown on consignment, but most of the grapes are grown in the vineyards of the wineries, therefore making for the boutique winery and the local produce.

Wine and tourism have been interrelated for many years for various reasons. This thesis sets out to address the following research questions.

1. What is the role of the tourism industry in fostering the wine industry in the Granite Belt in Queensland?
2. Does tourism and wine have a symbiotic relationship and if so, is this Wine Tourism?
3. Does wine tourism take place on the Granite Belt?
4. Is the Granite Belt supporting the wine and wine tourism industries?

Chapter 2

Wine Tourism of the world;

What can we learn to assist in the understanding of the Granite Belt region?

‘Wine tourism is a concept and product that is still undergoing substantial development. The term wine tourism embraces two industries each having substantial implications for regional economies, environments and lifestyles and which have been long entwined’ (Hall, Sharples et al.2000).

Wine and tourism have been interrelated for years. The tourism industry can see the attractiveness of wine and wineries. The wine industry can see the establishment of clients through their cellar doors, thus increasing sales and with the hope of association of the brand label for future sales (Hall, Sharples et al 2000). Wine tourism, where did it start and by whom? ‘Wine and man have always gone together. Indeed, whenever human beings have set out to conquer new lands, wine has followed them’ (Gilbert & Gaillard 2001). Cited in Hall 2000, ‘Peters (1997) suggests that successful viticulture transforms the local landscape into a combination of agriculture, industry and tourism.’

One could look at the ‘Grand Tour,’ the way nobles sent their sons to discover themselves, and to broaden their horizons with the sights and tastes of life before having to settle down (Hall, Sharples et al 2000). This could be the first and most official beginning of wine tourism. Culinary delights with the best wines, ciders and ales, and taking back to their heritage area the positive experiences and quite often cases of wine; then to further recommend others to visit such and such a vineyard.

Wine tourism has been present for generations, but now it has become a Government focus for numerous countries throughout the world. Governments worldwide recognise the potential of synergies between the tourism and wine industries. The Australian Government is only one government that is giving funding to have strategies put into action, to enhance joint industry ventures that will create regional economic viability.

Wine tourism occurs throughout the world; therefore if we looked at only a few countries, we could gain more specific information that would enable the writer to have the insight of what is happening within the world and how it could benefit the region known as the Granite Belt.

The writer has decided to focus on six (6) countries to overview their wine tourism, when it started and what is happening within these countries. Three countries from the old world and three countries from the new world have been chosen. Germany and Austria will be regarded as one country from the old world as they intertwined with each other throughout the ages. Germany and Austria were chosen as they are the oldest known countries that had official involvement in wine tourism, as cited in Hall 2000, 'that wine trails have been a component of the German tourism industry since the 1920s (Hall & Macdonis 1998). Bulgaria was chosen due to the changes from one political system to another, communism in the early 1990s to a democratic government today. Bulgaria has many challenges in front of it involving wine tourism, how is this country approaching the changes and how is it approaching wine tourism? France is naturally included as it is the country renowned for fine cuisine and wine.

The new world centres include South Africa, 'coming out' after apartheid and into equitable society. The United States of America was chosen as it is one of the largest and newest producers that is encouraging wine tourism from the individual wine operator to the wine companies, with government support. New Zealand was chosen as the neighbour of Australia. How is it promoting and dealing with wine tourism?

The diversity of the six countries may enlighten the road of wine tourism, and from there enable the Granite Belt Region to focus on its wine tourism, with old and new ideas that could enhance the future for the region. Can the above six countries assist Australia and give some guidance and direction for wine tourism in this country and especially to the Granite Belt in Queensland? How can the Granite Belt benefit from these countries experience?

Germany and Austria

Wine tourism within Europe commenced in Germany in the 1920s. Still today European wine tourism is 'an emerging tourism product' (Choisy 1996 cited in Hall et al 2000). Since the 1920s, Germany has had a history of formal wine tourism based on an official series of wine roads. These wine roads are referred to as 'Weinlehrpfad' meaning instructional wine paths. 'Such wine paths are well signposted and contain information on interpretive panels on viticulture, wine and culture' (Hall et al 2000).

Wine tourism has a key role in maintaining and increasing sales in the competitive world market (Hall et al 2000). Most red wines are sold within the country, rarely for export, whereas some of the white wines are exported throughout the world (Seldon 1996). In Germany there were eleven wine regions; by the late 1970s all had wine roads, with explanations of the areas, the viticulture and types of wines. (Johnson cited in Hall 2000) Since the unification of Germany, there are now thirteen wine regions, with wine roads (Seldon 1996).

The wine roads of the thirteen regions are, the Mosel-Saar-River region that has been described as 'nature has created such as brilliant combination of gentle, twisting river valley and soaring, broad-shouldered swathes of vines' (Clarke 1996). The Ahr and Mittelrhein would be the least known regions, but known well to locals as tourist areas. The Ahr region was having a steady decline and it was feared that the wineries would be forced to close, until the 1990s and this was in spite of the tourist trade, but has since increased planting. The Ahr and Mittelrhein are frequented by the city-dwellers as tourist spots as 'a breath of mountain air and a bottle of local wine' (Clarke 1996).

The Rheingau wine region has 'the presence of large estates owned by the Church and the nobility', this meaning 'fame for many of the villages' (Clarke 1996). The Nahe wine region is scattered with other farming ventures and 'a great deal of the wine is sold at the farm gate' (Clarke 1996).

The Rheinhessen wine region 'is the largest of the Rhine's wine-producing areas, as far as vineyard hectare and volume go.' There are 'some 165 villages nestled there in bland anonymity' (Clarke 1996). The Pfalz wine region is the 'driest and sunniest region,' with 'an extraordinary range of soils' (Clarke 1996). The Pfalz has co-operatives, as well as small wineries.

The Baden-Wurttemberg comprises 'two wine regions, yoked together by German bureaucracy into a single state for non-wine purposes, and in fact making very different sorts of wines' (Clarke 1996). Most of the wineries are in co-operatives. The Hessische Bergstrasse wine region is quite small, and many of the wineries are selling their land for housing. 'Bergstrasse means 'mountain road' (Clarke 1996). The current vineyards are shrinking but are supported by the local population and tourism.

The Franken wine region is nestled 'in the top north-west corner of Bavaria, Germany's greatest, most utterly beer-devoted state' (Clarke 1996). The region has wine packaged in different shape bottles from the rest of Germany. There are co-operative wineries as well as the single grower's wineries.

The Saale-Unstrut and Sachsen wine regions are the wine regions from the former East Germany. Both areas are relatively small but since the formation of the united Germany, these areas now have wine roads. There are now some small independent producers, but most wines 'still come from the previously state-owned cellars' (Clarke 1996).

The wine roads of all the above areas have been promoted by the German Wine Institute, via the production of brochures that have included the regions, the wineries, the wines and information in regards to the opening times of the wineries. These brochures are

produced in numerous languages. The German National Tourist Board has since promoted 'Culinary Germany.' The GNTB found that 'wining and dining' was 'the second most important holiday activity for German holidaymakers and the third most important holiday for Europeans' (Hall et al 2000). 'Culinary Germany' is about combining travel, culture with food and wine (Hall et al 2000).

Germany has found that wine tourism has an enormous positive impact on the local regions economies and this in turn impacts on the whole country. This product is regarded as viable, and as so, is being promoted by a national body with support from government. Even though Germany was officially and formally marketing wine tourism in the 1920s, it regards the product of 'wine tourism' as only being in the early stages. Germany looks at wine tourism positively with major growth potential.

Austria is similar to Germany in language, yet vastly different in climate, wines, and culture. Since the Austrian wine industry was 'discredited in 1985 with the Austrian wine scandal, imposed by a few wine makers that were caught adding diethylene glycol to their wines to give them more body,' the industry is working together to overcome the past and to create a new future. Austria's wine tourism is similar to Germany's; the one major difference is that all wineries are within a day's travel from Vienna. Of the 4804 vineyards 38% of these are less than a hectare in area; the small holdings are encouraging wine tourism within their regions (Hall et al 2000).

There are four main wine regions, Vienna, Niederosterreich, Burgenland and Steiermark. Tourist buses run to the wine regions and travel the wine roads. Austria produces most varieties of wines that are enjoyed by the Austrians. The wines are 'produced by smallholders who often run a Buschenschanke, or country inn. These places are popular with Austrians who will travel from the other side of the country in order to buy and drink wine in such congenial surroundings' (Clarke 1996). The food and wine connection, wine and home made food, home grown food, national outfits, and accordionist, both inside and outside areas for tastings and eating depending on the weather. The wineries are set up for tourism and fellow Austrians utilise all the tourist attractions.

The lessons from Germany and Austria for wine tourism in the Granite Belt area are that both Germany and Austria have wine trails that are sign posted and also promoted by brochures. Both countries have festivals, with the association of food and wine. Due to the countries internal outlets and wine tourism, very little wine is left to export out of the countries compared to the volume of wine that is produced. Wine trails and festivals, the celebrations associated with wines, different package bottles, and the national touches of food and entertainment that entice the tourist to visit the wineries.

Bulgaria

‘Since escaping from the shackles of Communism in the early 1990s, Bulgaria has rediscovered the qualities and policies that had once made its wines some of the most popular and reasonably priced in Europe’ (Joseph 1998).

Statistics have shown ‘that Bulgaria has achieved great success through the modernisation and adaptation of its wine industry...Bulgaria has a rich history of wine-making’ and of producing good wines. Bulgaria is divided into regions, such as the south-west region (Dolinata na Struma Region), this area is distinguished by its Mediterranean type climate and underlying chalk and sand, the southern region (Trakiiska Nizina Region), the land of the ancient Thracians, the southern Balkans (Rozova Dolina Region), the northern region (Dunavska Ravina Region) and Ruse that is situated on the Romanian border and the eastern region (Chernomorski Region) bound by the Black Sea, and has a moderate maritime climate. All the regions are varied and have wonderful tourism potential (Callec1999).

The wine industry in Bulgaria is growing despite the technical abilities, but has numerous problems with the consistent production of the grapes. Wine tourism is operating in an official form, such as a wine road (Hall et al 2000), but there appears to be more of an informal approach to wine tourism.

The old Tokay caves are being promoted, but the distances between these wineries (caves) are quite extensive, as they are in 'out of the way places' they tend to hinder the wine tourist, so that only the devoted wine tourist tends to go there. Yet in some of these regions, the combination of wine tourism, the local history, the local people and the every day way of life is creating the informal approach to wine tourism. The rural regions have people tending to the vines, picking the grapes, the donkey drawn carts, the essence of wine tourism in the making. One of the main obstacles in wine tourism at present revolves around the land holdings. The present Government is giving the land back to the original owners and there are problems that have occurred due to this - such as who is the owner and where are they? Once all this is sorted out, the belief is that the vineyards will be planted in large portions and more quality wine will be produced (Waldin, Woods 1998). This would then enhance wine tourism, which is expected to prosper.

Another lesson for the Granite Belt region is that they should keep in mind the distance between wineries (caves); this appears to be a deterrent except for the more adventurous wine tourist. Also the quality and quantity of wine being produced is important for wine tourism.

France

'Wine is the soul of the French and despite countless invasions, the French always managed to save that soul' (Callec 1999). 'France, of all countries, offers the largest and most varied cornucopia of interesting places for the wine tourist to visit....Not all wine areas are spectacular, but many offer alternative sightseeing opportunities to leaven the diet of wineries and vineyards' (Liddell 2000). France is regarded as the very heart of the wine world. France has the regions of Bordeaux, Burgundy, Champagne, The Rhone Valley, The Loire Valley, Alsace and then to Southern France, these regions formed the basics of our wines of today throughout the world (Clarke 2000).

France is a place where you would expect wine tourism to be flourishing, a place of culinary delights and wine. France is still the highest tourist destination today. Journalists have created wine tours across France and written volumes of information for the tourist to follow their steps and taste the delights of the wines discovered and enjoy the accommodation and fine food hidden in 'off the tourist maps areas'. Liddell wrote about a tour of French wineries in two weeks, with a full agenda for the tourist, the places to eat, the places to stay and the wineries he recommended to visit (Liddell 2000).

The hospitality offered by French wineries if a tour has been organised is outstanding. Normally, to taste wines at French wineries can be difficult, most wineries are normally not open to the public. The history, the chateaux, the tours of wineries and the food of each region goes together if on a tour. The wineries take you to the barrel rooms, but not through the wineries, no crushers, no vats to be seen (Simic 2000).

With the economic downturn of the 1980s, and the new regulations on alcohol advertising, many wineries in France looked at direct sales through their cellar doors. With so many small wineries, the marketing of wine tourism has been difficult. Many small wineries have a display and a sign that welcomes visitors, tasting is normally free, but an actual tourism guide of all these small wineries at this stage is not available to the tourist (Hall et al 2000).

The larger wineries have embraced wine tourism, and run a commercial venture to lure the tourist to their wineries for direct selling and marketing for the future. The Tourist Roads of France combine wineries with accommodation, heritage, museums, and anything of importance in an area. With this style of tourist roads, the tourists are varied and there should be something for everyone within one of these roads. There were 270 tourist routes in 1997. Some of these routes are the gastronomic routes; the cheese route, the craft routes and many are the wine routes. If wine is not your focus within tourism, heritage could be, therefore on your travels the likelihood that you would end up visiting a winery is high since it is in the area of the heritage destination that you want to visit. The tourist roads have been designed to meet all needs, to promote France and the

regions. (Hall et al 2000) Wine museums and wine festivals are a highlight throughout France. The festivals are advertised within the regions as well as at tourist associations.

The economic value of wine tourism to France is enormous, but wine tourism is packaged as a tour with other components. The cultural tourism of the region incorporates wine, food, and historical aspects. Tours are organised and packaged as a whole, this covers all the tastes of a tourist. Some of the packaging for Burgundy has included 'wine and mountain biking, wine and boat cruising, wine and golf' (Hall et al 2000). Wine tourism 'centred solely on the wine theme' marketed for 2 to 3 day breaks, tend to be upmarket. These wine tourism packages can include classes on wine appreciation, complexity of wine (Hall et al 2000).

Wine and food is the second main reason people visit France. Regional tourism is mainly based on wine and culinary attractions. Culture, history and architecture are the main reason people tend to visit France, though food and wine is second, wineries are not always visited as the wine and cuisine is present within the regions cafes. The realization to regional areas of the benefits of wine tourism is increasing. France is a destination known for its wine and food, and the expectations of a tourist is the ability to sample wines, buy at the cellar door, to be able to go on wine tours of an establishment and to follow wine routes is increasing (Hall et al 2000).

The lessons for the Granite Belt region from France are fine cuisine and wines. Festivals associated with food and wine; health and wine; bike/car and wine; nature and wine; cheese and wine; crafts and wines; heritage and wines; culture and wine; whatever the region has to offer and then tie this with wine. The boutique wineries that are quite often not open, except by appointment appear to be a great disappointment for the wine tourist. The larger wineries that have embraced wine tourism, excel in hospitality and tourism, and are professional operations. Areas that excel are wine museums and festivals, festivals that are advertised with regional tourist associations, trail maps and leaflets promoting whole areas with sign posting and package wine holidays. Wine tourism professionally promoted and catered for appears to be the most successful in France, the

combination of the whole area within the promotions and being open and hospitable for the wine tourist is extremely important.

South Africa

South Africa has had a 'steep learning curve since the demise of the Apartheid regime in the early 1990s and its subsequent emergence from international isolation. But year by year it's catching up' (Clarke 2000).

'It took the collapse of apartheid to liberate the industry from the mindset of state protection...Between 1992 and 1999 the number of wine producing cellars grew by 52 per cent' (Hall et al 2000). With the changes in government, South Africa joined the global community. In 1999, the South African Wine Industry Trust was formed by the government and the wine industry. The Trust was formed to focus on building the wine export market and to assist with the transformation of the wine industry from the traditionally white-owned industry to a more multi-cultural industry. The Trust assists in new farms, wineries, research, technology and marketing. Marketing and promotions, has led to brochures and advertising being available in South African tourism offices, both locally and abroad (Africa News Service 2001).

The independent research group known as the South Africa Wine Industry Information and Systems has been focusing on sectors of employment and wine exports. Research 'confirmed the important role of wine sector tourism...estimated employment 208 000 people in sectors ranging from primary agriculture to cellars, manufacturing, wholesale and retail, as well as tourism,' of these numbers 48 000 people worked with tourism (Africa News Service 2001).

The first wine route in South Africa was established in 1971 and was developed in the Stellenbosch area; this was achieved by 'the product of leadership, determination and endurance in the face of obdurate bureaucracy....taking on the government to fight for changes in the liquor law to facilitate the tasting of wines on estates' (Hall et al 2000). With

the establishment of this wine route and the success that followed, other wine routes were developed as 'the potential benefits of wine route tourism' was recognised (Hall et al 2000). With 14 wine routes, promotions of the wineries and the award winning wines, tourist have a good range to choose from. 'If a wine route is forced to take a back seat on the grounds of wine quality, then other attractions are found to lure the visitor. These may include racehorse breeding, rose and fruit growing, trout fishing, river rafting and cheese production' (Hall et al 2000).

In South Africa 'the 'supply' of wine routes through the participation of wine producers and the orchestration of wine route associations is to meet what appears to be a growing demand for wine tourism' (Hall et al 2000). Wine tasting is essential and was the original feature of the wine routes, yet this 'feature alone is unlikely to sustain tourist growth. Tourists on wine routes tend to travel in groups. The 'idea' of a wine route also incorporates images that sustain the notion of exploration and discovery. A wine route allows the tourist to engage with the diversity of the cultural and natural features of the landscape' (Hall et al 2000).

'There is now more of a holistic vision that includes the consumption of nature and heritage with the concomitant provision of accommodation and restaurants. But the vision is wider still. When workers on the wine estates are able to produce and market their own wines, a wind of change is blowing. Appreciation of the social and economic transformation of the wine lands is also a tourist agenda. However, wine and its consumption remain the focus (Hall et al 2000).

Some of the lessons for the Granite Belt region from South Africa are as stated in Hall 2000, if the wine quality of a trail is not equal to others, then marketing and promotions include local and regional attractions. It has been found that wine tourism is more successful with the combination of wine trails and 'the diversity of the cultural and natural features of the landscape' (Hall et al 2000). South Africa has a positive focus on wine tourism; this is a holistic vision, encompassing all areas, regional, cultural and heritage.

The United States of America

‘Almost all of the United States’ (50 states) produce wine’ (Clarke 1996). When people think of American wines they think of California, ‘the biggest producer of North American wines’ and the Napa Valley is California (Callec1999). The United States of America can be divided into four large wine zones. These are the North East (New York: Finger Lakes, Lake Erie, Hundson River, and Long Island), the South and the Mid-West (Texas, Carolina, New Mexico, Georgia, Missouri, Arkamas, and Iowa), California (Napa, Sonoma, and Carneros) and the North West (Washington State, Oregan, and Idaho) (Callec 1999).

The United States of America has followed the tradition of wine routes that are present in Europe. The American Federal Government in 1983 introduced the American Viticultural Areas (AVAs), this meaning that wines have the region on the labels and that 85% of the grapes utilised must be from the region. One suggestion cited in Hall 2000, in regards to wine tourism in America by Bell and Valentine (1997) has been ‘wines are famous for coming from a particular region, the region is renowned for its wines - making wines and vineyard tours popular with tourists.’

With the strictly regulated alcoholic laws in regards to sales of alcohol, wine tourism in many cases has assisted in providing opportunities for ‘wineries to circumvent the traditional retail system which may have numerous legal constraints and be dominated by large competitors and wholesales distributors’ (Hall et al 2000). Wine tourism in each region is quite extensive, yet extremely similar; therefore the writer has decided to look at one area in each region that has something to offer the Granite Belt.

The Finger Lake ‘region has faced a decline in the number of growers, the number of wineries has increased, with many of the newer boutique wineries focusing on premium vines and linked to the tourist trade’(Hall et al 2000). It is estimated ‘that over one million tourists visit the state’s wineries each year.’ Cited in Hall 2000, Henahan and White (1990) found that many wineries relied to a large extent on tasting rooms as a means of distribution.

Wineries have joined together to form wine trails. They host tastings, food and wine combinations and seasonal festivals. The wineries target a diverse market, ranging from day-trips, week-ends away and longer vacations. All the wine trails are marketed to encompass the natural beauty and geography (Hall et al 2000).

Cited in Hall 2000, Peters (1997) characterizes the wine scape of the Finger Lakes viticultural region as 'visually appealing throughout the year, with seasonal changes that are more dramatic than those of the Napa Valley.' 'The natural attributes and man-made attractions contribute to the development of wine tourism in the area' (Hall et al 2000). The wineries marketing include wine trail brochures, signage, newsletters, press releases, wine and food events, harvest festivals and special tastings (Hall et al 2000).

In Texas, the wineries on average have 10% of their wine sales through the cellar door. The larger wineries still concentrate on supermarkets and the chain stores, but the smaller wineries are marketing wine tourism, therefore the development of this market is extremely important to them. 50% of the wineries in the state of Texas produce less than 10 000 gallons, and of this quantity approximately 60% of the smaller wineries sales are through the cellar door, wine tastings, visitors to the wineries (Hall et al 2000). Therefore for the smaller wineries the wine roads and the brochures, the marketing of their wineries to visitors is extremely important.

'The North-West region is better known as Washington State and Oregon (Callec 1999). 'Oregon wineries consist of small, family-run operations, and the wines and their producers can be idiosyncratic, such as a winery in an old turkey-plucking shed' (Clarke1996). Wine in this area is a recent phenomenon, and the wines are different from California. The fact that this area is receiving attention for the quantity of the wines, creates a market for tourism, and wine tourism (Callec 2000).

'The Napa Valley; that has more than five million people visit the region each year, with more than 240 wineries. The 'Napa Valley has more than a quarter of California's wineries; all packed into one of the state's smaller growing areas' (Cass 2000). The larger

wineries do not focus as much on wine tourism, as they have other avenues to sell the wine, such as chain stores, liquor outlets and only 10% of their sales are through the cellar door. Yet the smaller boutique wineries focus on cellar door sales. Their main sale outlet is wine tourism. Wine tourism has been promoted if an excess quantity of wine is available; this method has seen the sale of the wine increased.

The lessons from the United States of America in regards to wine tourism for the Granite Belt is that wine trails are successful, but these must be promoted by wine trail brochures, good signage, press releases, newsletters, food and wine festivals, utilising the natural landscape and the regions attractions that entice the tourist to visit the region and the wineries. Accommodation, restaurants and cafes are extremely important to the wineries, to have these as part of the winery and/or to have near the wine trails. To promote wine tourism with history of the region, harvest festivals and also to have special occasions and special tastings, all the above have been successful for wine tourism, especially in the small boutique wineries in the United States of America.

New Zealand

The land of clouds, active volcanoes, hot water springs and mountains, some areas covered by enormous glaciers and ice fields and fjords, a tourist destination just with the natural resources, of the land, the sea, and the latitude.

There appears to be conflicting information in regards to wine tourism and the wine industry in New Zealand, even though the wine industry officially commenced in 1816 with the first plantings of the vine. Callec 2000 writes of the nine major wine regions, whilst the New Zealand visitor guide writes about the 15 major wine growing regions, and how all the regions differ for the tourist to explore New Zealand, meet the local people and taste the local wines (NZ Visitor Guide 2002).

Wine tourism did not commence until 1976, after the changes of laws in regards to alcohol in New Zealand. In 1976 it became legal to have cellar door sales and wine sold and bought in cafes (Hall 2000). Vidals in Hastings could be described as a pioneer in wine tourism in New Zealand. In 1980 Vidals opened a wine museum, a winery tour, wine sales and a restaurant (Hall et al 2000).

In New Zealand four major producers dominate the wine production of the country, producing 90% of the country's wine, these being Corbans, Montana, Nobilos and the Villa Maria group. The remaining 10% of wine production within the country is produced by the other wineries – in 1997 there were 244 wineries that represented 93% of the wine industry, as cited in Hall 2000, Campbell's 1997 'this is the age of the micro-boutique winery.'

The New Zealand wine industry structure by Beverland 1998, as cited in Hall 2000, 'has important implications for wine tourism and the business strategies of individual businesses and the industry as a whole, as the strategies of the larger companies may have substantially different dimensions than those of the boutique wineries Companies targeting growth look towards the export market, wine tourism is a smaller part of growth, but for the boutique smaller wineries, 'cellar door sales are an essential component of their sales'.... Wine tourism is 'one component of a range of selling options' (Hall et al 2000).

There are nine areas of wine tourism and wine production in New Zealand. Northland is in the beautiful Bay of Islands and the smallest wine region. There are a dozen productive wineries in this area, and a number of these have cellar door sales and tastings. Matakana has wine trails, modern cafes, up market restaurants, fine dining on local cuisine, quaint, old world, laid back atmosphere that lends itself to wine sampling and relaxed al fresco dining, and only one hour's drive from Auckland city. Northland and Matakana are promoted as a regional experience, covering all aspects of the regions (NZ Visitors Guide 2002).

Rural West Auckland promotes a wine trail, the short distances between the wineries, the natural landscape, thermal pool and superb vineyard restaurants, marketed as an escape from the pressures of city life. 'Some wineries have extensive picnic grounds, children's playgrounds, petanque and croquet areas. All have vineyard tours by arrangement and cellar door sales' (NZ Visitors Guide 2002).

Henderson is an area of accessible wineries by walking from the city centre. Old established wineries with excellent modern facilities. Cellar sales are extremely important, with restaurants and cafes promoting their wines. The Henderson wine trail is described as a 'cultural experience' (NZ Visitor Guide 2002).

Auckland has the three largest wine producers of New Zealand in the region, and a dozen boutique wineries located mainly in the south Auckland area. There is a local demand for cellar door sales. Auckland is known as the 'City of Sails' and has a wine trail that encompasses boutique wineries through to the largest producers (NZ Visitors Guide 2002).

Waikato, Bay of Plenty has a wine trail, but the wineries are scattered and present a challenge due to the distance between them. A dozen wineries that produce about 3% of New Zealand's wine, these wineries encourage tourists and have built their establishments for the tourist to enjoy, between restaurants, landscaped grounds and well appointed facilities (NZ Visitors Guide 2002).

Waiheke Island also known as the 'Island Suburb,' is 92 square kilometres of sandy beaches, native bush, with 30 wineries nestled in lush valleys. Winery tours for this area are by private arrangements and mini-bus tours. The Great Barrier Island winery has a tourist focus with a difference, they encourage cellar door sales, but there are only two accesses to this winery, by boat to the cellar door, or a hitching trip overland. Waiheke Island is promoted as a quiet rural setting with restaurants and stunning sea views (NZ Visitors Guide 2002).

At Gisborne in October each year, all the vineyards celebrate the 'First Light Wine and Food Festival.' Throughout the year, the wineries are open for tastings and cellar door sales. (NZ Visitors Guide 2002) Hawke's Bay has over 40 vineyards, with wine trails and wine trail safaris that include wine tastings and cellar door sales. Wine and food are promoted as local cuisine and wines. Wairarapa has 40 wineries that zealously focus on quality. In November each year, the 'Toast Martinborough Wine and Food Festival' is hosted, this draws in thousands of tourists to the area, for quality wine tastings. Wairarapa has a wine trail that is described as a 'must see' if one is into wines. Wines and the local cuisine is again the focus (NZ Visitors Guide 2002).

In Nelson the wine industry is relatively new and the 30 wineries are scattered over the plains. The majority of wineries are family owned businesses that welcome the tourist for wine tastings and cellar door sales; they also cater for the tourist with meals and crafts. Marlborough has over 40 wineries that have wine tastings and cellar door sales, a wine trail that encompasses all the wineries. In February each year the 'Marlborough Wine and Food Festival' brings in thousands of tourists and Marlborough has dubbed itself the 'Gourmet Capital of New Zealand' makes this festival a cuisine and wine delight for tourist (NZ Visitors Guide 2002).

Waipara is about an hour's drive from Christchurch, and has a festival in March each year. All the wineries join forces and promote, the 'Waipara Wine and Food Celebration.' Most of the wineries are open throughout the year for wine tastings and cellar door sales. Central Otago has over 40 wineries and has four separate wine trails; these trails are promoted in conjunction with the wineries but also focus on the natural beauty of the countryside. Half of the wineries are open to the public all year round for tastings and cellar door sales (NZ Visitors Guide 2002).

You could plan a trip to New Zealand and work through the wine festivals and then to the wine trails, it appears that the timing of festivals is continuous rather than competing for the same time periods.

The New Zealand wine regions all have wine trails, wine tastings and cellar door sales and some have festivals. Wine tourism within New Zealand is growing and the first wine tourism meeting was in 1998. This was to organise a wine tourism association and then to enhance a wine tourism strategy such as in Australia. 'Wine tourism is important to New Zealand at both a regional and an individual winery level. At the regional level wine tourism is a significant component of tourism in a number of wine regions as well as being a major contributing factor in the creation of regional tourism images. The economic impact is also significant. In 1997 products and services sold at wineries in New Zealand was approximately NZ\$127 million' (Hall et al 2000).

As cited in Hall 2000, Johnson 1998, 'described cellar door sales as being highly or extremely important to their business, representing approximately 20 per cent of the wineries' total sales.' As Johnson's research in 1998 points out in the tourism and marketing of wineries, as cited in Hall 2000, 'wine trails and winery-based events were regarded as the two most successful regional tourism promotions; the wine industry had much to offer the tourism industry and the tourism industry was important to the wine industry as a whole; the primary responsibility for the promotion of wine tourism is seen to rest with the wine industry.' Johnson's survey also conceded that a sizeable wine tourist market exists, of approximately 3 million visits to New Zealand wineries per year, 19% are international visitors and 81% are domestic visitors (Cited in Hall et al 2000).

The lessons for the Granite Belt region from New Zealand are that the wineries have combined the regions with the wines, landscapes, natural and built attractions, history and culture and have built a wine tourism industry. By working with other wine regions, festivals and events can be continuous throughout the year, attracting wine tourists to regions for the uniqueness that the area promotes.

The above analysis of the six countries would suggest that the following should be adopted by Australia. These are: -

1. Wine trails with brochures, maps and good signage;
2. Promotion of the combination of local cuisine and wine; wine and the natural environment, the scenery, the culture and the history of the region
3. Wine festivals
4. Not disappointing the tourist, being open rather than appointment only and
5. The cellar doors to be reasonably close to each other.

What is Australia doing, the same as the other countries or does Australia differ, and if so, how? What could the Granite Belt learn from the rest of Australia in wine tourism?

Chapter 3

Wine Tourism in Australia

The Australian wine industry is relatively new compared with the rest of the world. All states and territories grow grapes and make wine and all are focused on some form of wine tourism. 'Wine is very successfully grown across Australia today, not only does it bring financial stability to country areas but in many regions it encourages a significant Tourism industry. Tourism encourages all types of infrastructure, accommodation, food facilities, and specialty gourmet food and cheese procedures, crafts and of course festivals' (Hardy 2001).

In June 1996, Strategy 2025 was launched by the Australian Wine Foundation. It contains the aspirations and goals of the Australian wine industry over a thirty year period. Strategy 2025 incorporates: the Marketing Decade; National Wine Tourism Strategy; Education and Training Review; National Environment Strategy; and the Research and Development Strategy (Winemakers Federation of Australia 2003).

'Strategy 2025 committed Australia to "innovation and style from vine to palate" and recognised opportunities for branded wines in specific global market segments, in the premium domestic market and in wine tourism' (Winemakers Federation of Australia 2003).

Since the release of Strategy 2025 numerous conferences have occurred throughout Australia in relation to all aspects of the wine industry, whether this is marketing wines and/or wine tourism. At the 1999 Australian Wine Marketing conference, Cartiere stated that wine was highlighted as part of one's lifestyle and people tending 'towards experiences and not just products.' From this conference many references were made about wine tourism and what the consumer is expecting, and how 'food and wine tourism provides an opportunity to learn more about what one is consuming and it meets the need for quality "customised" food and wine sensory experiences' (Winemakers Federation of Australia 2003).

This conference alone highlighted the challenge and the needs of the smaller wineries to produce “hand crafted wines” and to focus on wine tourism as a marketing strategy. Wine tourism has viability especially for the newer and smaller wineries, in this format the wineries can ‘influence customer perceptions and ensure a higher margin on sales. Large producers who are prepared to “act small” in the way they present wineries and products can also benefit from wine tourism (Winemakers Federation of Australia 2003).

The wine industry is building new facilities that cater for the tourist and how these wineries are promoting their wineries and these facilities to the public differs slightly. Regional promotional groups were utilising the wineries to promote the regions and this in turn was supporting the wine tourism industry. In the strategies under the marketing concept of number 24, to ‘secure wine and tourism stakeholder commitment and funding to implement the 1999 National Wine Tourism Strategy Plan’ & number 25, to ‘establish Australia as a globally recognised wine tourism destination which will generate A\$250m per annum on new international wine tourism business by 2010,’ highlight the importance of wine tourism in the documentation. They incorporate securing wine tourism commitment and to ‘establish Australia as a globally recognised wine tourism destination which will generate A\$250m per annum on new international wine tourism business by 2010’ (Winemakers Federation of Australia 2003).

The National Wine Tourism Strategy is only one of the sections within Strategy 2025, and this section has a strategic business plan for a three year period – the current strategy is ‘2002 – 2005 Embrace The Challenge’, which builds on from the previous 1998 business plan. 2002 – 2005 emphasis is ‘on improving profitability for wineries and tourism operators.’ ‘Delivery of the National Wine Tourism Programme is in four key areas:

- Ensuring that the wine industry is aware of the opportunities to increase visitation and yield for their business related to participation in wine tourism.
- Improving the opportunities for interaction and collaboration between the wine

and tourism industries resulting in a higher level of understanding and a strategic business commitment to wine tourism.

- Providing tools to assist winemakers and tourism operators to present higher quality wine tourism products and services that will result in innovation in wine tourism, a higher level of consumer appeal for the experiences that are available and ultimately higher visitation and yields.
- Heightened definition, promotion and awareness of the Australian wine tourism experience in both domestic and international markets that will deliver higher visitation and yields' (Winemakers Federation of Australia 2003).

With a National Strategy in place since 1996, how has this affected wine tourism within Australia? Is it any different from the rest of the world? One must realise that even with a strategy and business plans, they are fairly useless unless they are implemented. Since Australia is a large land mass with all states and territories involved in some form of wine tourism, the writer has decided to concentrate on the established areas of wineries and wine tourism; these being Western Australia, South Australia and New South Wales, from these areas to Queensland and the Granite Belt region. The reasoning of choosing these States by the writer is that Western Australia stands out as a wine tourism destination, New South Wales as both a bordering neighbour, especially close to the Granite Belt, as well as being the longest establish wine region in Australia. South Australia was chosen due to the size of the State in relationship to Queensland and also the fact that it borders onto Queensland.

Western Australia

Western Australia wine industry has five major areas, these being the Coastal Plains, Margaret River, Great Southern, Swan Valley, and Pemberton. Although Western Australia's wine 'accounts for less than three per cent of the national total, the state produces more than 20 per cent of Australia's premium wines. The wine industry is one of the highest value-adding agricultural contributors to the state. Of the 129

wineries in Western Australia, one third are within 35 minutes drive from Perth, the state's capital' (QLD State Development 2001). The two areas within Western Australia that the writer has chosen are the Margaret River region and the Swan Valley region.

'Wine tourism in Western Australia is a credit to the state, with the Margaret River region having a number of world class wineries, winery restaurants and galleries. A wine adventure around Western Australia is a rich experience, indeed. It makes the journey to the West a most worthwhile one' (Hardy 2001).

'The wine industry in Western Australia accounts for 3.5% of the volume of total Australian wine-making grape production and 5.5% of the value of the wine crush.' (Jolly 2002) The main areas of wine tourism within Western Australia are the Margaret River region and the Swan District. The Margaret River region leads in wine production, growth and wine tourism, whilst the Swan District is revitalising itself, in particular in wine tourism. The Western Australian Government and The Wine Industry Association of Western Australia, in October 1997 produced the Western Australian Wine Industry Strategic Plan. Part of this strategy was 'the adoption of policies to encourage an integrated and growing wine tourism industry' (Jolley 2002).

Wine tourism in the Margaret River region has become quite important in the last few years. In 1998 the First Australian Wine Tourism Conference was held at the Margaret River region, and then the Second Australian Wine Tourism Conference was held in August 1999. Many topics of wineries and tourism were covered, from 'The Demand Revolution and Wine Tourism'; WET Tax and Wine Tourism', which was a major topic, through to promotions and marketing, regional tourism, food and wine and the whole experience, cellar door sales and salespeople, festivals and strategies for wine tourism from a National prospective through to the Western Australian prospective. The major theme was that 'food and wine can be a powerful force in regional tourism; able to motivate people in its own right to visit a destination, and to build length of stay and increased expenditure levels. The food and wine experience needs to flow as a natural element through all the tourism and

hospitality products of a region’ (Bracher 1999).

‘Wineries in the Margaret River area reported that cellar-door sales account for 34% of total revenue.’ The wineries ‘attract small groups of family and friends, organised wine tours, and larger tour groups on general sightseeing trips’ (Jolley 2002).

There are 24 main wineries in the Margaret River region, these wineries ‘both large and small, have constructed restaurants, art galleries and other art and craft establishments’ (Hardy 2001). Within the restaurants ‘the cuisine of many cultures can be found in the town of Margaret River’ (Hardy 2001).

The wine tourism industry in the Margaret River is based on wine trails and marketing the whole of the area and what it provides. The area has been marketed as ‘picturesque scenery, back to nature, the wines, and the ability to escape’ since the area is three and a half hours drive from Perth. The other side is ‘the beaches and the native forests’ and also the ‘food and wine culture.’ The area is also promoting itself with Concerts in the vineyards. There are strong linkages between gourmet food and wine and these are being promoted, but the main areas of wine tourism are relatively similar to the rest of the world. The Margaret River wine tourists are mainly from Western Australia (62%) then interstate (29%) then international (9%) (Jolley 2002).

In contrast, the Swan Valley’s main wine tourists are international and interstate; this may be since it is in the Perth region – Perth being the Capital of Western Australia. The area is increasing its infrastructure for tourism and is promoting the wine tourism with the heritage values of the area. It has local festivals and has wine trails and wine maps of the region. Winery tours can commence with a river cruise, then to tastings at the cellar door. Many of the wineries are offer refreshments, light refreshments and full restaurant cuisine.

‘The highlight of the year for the Swan Valley is the Annual “Spring in the Valley” festival held in October. This celebration of fine wines, superb food, music, art and

theatre involves many of the leading wineries, who all feature at least three different attractions at their premises’ (Hardy 2001). The Swan Valley includes all the usual wine festival delights that concur throughout the wine world. Whether this be the ‘classical, jazz or popular music from live bands, watch magicians and street theatre, participate with potters and painters, see wood carving, tour historic buildings and participate in many other interesting activities, all of course, accompanied by the fine wines and foods of the region’ (Hardy 2001).

The lessons appear to be the same again for the Granite Belt region, food and wine, the local attractions mixed with wine and tours. To have festivals that promote the local cuisine and the wines, as well as the whole region. To have the wine and tourism industries, thus becoming wine tourism, working with other industries for the benefit of the whole region. Having restaurants, cafes and accommodation in the wine regions that the tourist can enjoy, which in turn enhances the wine tourism, and the experience associated with the wine and tastings.

South Australia

‘South Australia is referred to as the wine state as it generates half of Australia’s wine and 70 per cent of the country’s wine exports, South Australia is the home of Australian wine and the ideal destination for wine-touring holidays’ (South Australian Wine and Food Tourism at a Glance 2002). ‘It is estimated that wine tourism contributes more than \$500m to rural Australia each year. In South Australia, spending at winery cellars amounts to \$342m’ (Jolley 2002).

South Australia has fifteen wine regions; these are the Adelaide Plains, Adelaide Hills, Eden Valley, Barossa Valley, Clare Valley, Coonawarra, Padthaway, Wattonbully, Fleurieu Peninsula, McLaren Vale, Southern Fleurieu, Currency Creek, Langhorne Creek, Coastal Regions of South Australia and the Riverland.

‘South Australia’s wine industry is as diverse as it is large. Small family-run boutique wineries sit alongside major national companies producing the nation’s most awarded wines. With more than 350 wineries and 220 cellar doors in 17 wine regions, most roads in South Australia lead to wine country’ (South Australian Wine and Food Tourism at a Glance 2002). ‘The South Australian Government is understandably very supportive of its wine industry and the burgeoning wine tourism industry’ (Hardy 2001).

The two areas in South Australia that the writer has chosen are ‘without doubt the most famous of Australia’s wine regions,’ namely, the Barossa Valley and the Clare Valley, ‘the spiritual home of the small boutique winery’ (Hardy 2001).

The Barossa Valley is situated about an hours drive north of Adelaide and the Clare Valley is situated about one and a half hours drive north of Adelaide. Adelaide is the capital city of South Australia. Both the Barossa Valley and the Clare Valley are well established wine areas and both have promoted wine tourism. Both areas have wine trails and also have incorporated bus tours and package wine tourism holidays, which can include accommodation and fine gourmet foods of the districts.

In the Barossa Valley there is a Vintage Festival, which has been going for 56 years and has promoted the wine season and vintage for the district. The wine ball starts the festival which runs for 7 days. The promotions are based on numerous areas such as wine trails, wine tastings, live theatre, jazz groups, festival parade, country themes, local produce markets and wine auctions. The Barossa Valley Festival covers all aspects of the local and greater community to promote local wines and wine tourism in general for the community (Barossa Vintage Festival 2003). This festival is referred to as a cultural festival that is held every two years. This year’s theme is ‘handmade’, the mixture of food, wine and people.

The festival commences on Easter Monday, and the whole festival is similar to a fair, situated on and around the Tanunda oval as the centre. All local wineries set up marques offering tastings, and then conduct a wine auction (Hardy 2001).

The Spring Barossa Music Festival is a two week event of concerts at the wineries and other local venues. The wine tastings, cellar door sales and the combination of fine wine and foods, a gourmet experience with concerns for two weeks (Hardy 2001).

The Clare Valley is 140kms north of Adelaide, with the vineyards and wineries located throughout the valley. 'In 1984, Clare became the first region to introduce the concept of a gourmet weekend of wine, food, music and art, a celebration of the culture of wine' (Hardy 2001). This festival is celebrated each May.

The Clare Valley and the Barossa Valley both have festivals, wine trails, music (concerts) in the vineyards, cellar door sales and promote locally grown food with the local wines. South Australia promotes the natural wonders of the state, from desert to lush green rolling hills and valleys that produce some of the best produce and wines within the world (South Australia 2003).

The lessons for the Granite Belt appear to be getting enforcement in the same direction. Wine and food, the promotions of local cuisine and wines, mix this with festivals, wine trails and tastings and the natural landscape, with jazz and opera in the background. Festivals with good restaurants, cafes and accommodation enhance the wine tourism experience.

New South Wales

'Australia's wine industry began in Sydney. The first grapes were planted in February 1788, just a month after the arrival of the First Fleet, near the site of today's Royal Botanic Gardens. Vineyards are scattered from the outskirts of Sydney to the

outback, from the Snowy Mountains to the subtropical north coast, each with its own special character. New South Wales now has more than 300 wineries, including Australia's longest-operating winery (established 1828) in the Hunter Valley, just two hours drive from Sydney' (QLD State Development 2001).

New South Wales has nine wine regions, these are; the Lower Hunter Valley, the Upper Hunter Valley, Mudgee, The Riverina, Cowra, Orange, Hilltops-Young, Canberra, and other regions of New South Wales, the other regions have eight small areas within. The writer has chosen to explore the Upper Hunter Valley and the Lower Hunter Valley.

The Hunter Valley, situated in New South Wales 'at the junction of the Pacific and New England Highways..., has some wonderful guest houses, first class hotels and resorts, some of the best restaurants' (Maher 1998). The Hunter Valley is a well known wine tasting destination. The valley and surrounding areas have vineyards with both small and large wineries. The Hunter Valley region has tours of the wineries, whether this is by appointment or to wander in, bus tours and package wine tour holidays are highly promoted. Wine tastings and cellar door sales are continuous, as the area is known and caters for wine tourism.

The Hunter Valley is divided into two areas, the Lower Hunter Valley and the Upper Hunter Valley. 'The best known and most visited premier winegrowing region is the Lower Hunter Valley' (QLD State Development 2003). The Lower Hunter Valley 'was the first wine region to really cater for the wine-lover with properly turned out tasting areas, personal service by proprietors and a framework of restaurants, galleries, art and craft outlets and other venues of interest to attract visitors. Probably it was its proximity to Sydney and the fact that Australia's first boutique wineries sprang up here that the Hunter led the way...Today the Lower Hunter boasts around 70 wineries and many more vineyards. Nearly all are very keen to open their doors and offer hospitality to the visitor' (Hardy 2001).

The Upper Hunter Valley is mainly the larger wineries, such as Arrowfield, and Rosemount Estate. The wineries are open to the public via the cellar door tastings and sales. One of the wineries in the area is the Cruickshank Callatoota Estate, located in the Upper Hunter Valley. The owner John Cruickshank originally founded the Canberra Food and Wine Society in 1953. In 1995 the winery visitor's centre won the Hunter Tourism Award for Excellence as "The Most Significant Local Tourism Attraction" for the entire region (Hardy 2001). With the numerous wineries in the area, both Lower and Upper Hunter Valley, who offer a mail order service, wine tastings and cellar door sales, the area as a whole is promoted for wine tourism.

The area is promoted as fine cuisine and fine wines. The Hunter Valley wineries have joined together to promote the area and have an established wine club. This club gathers its members through cellar door sales and telephone sales to join. The club invites the member to the area with discounts, as well as sending wine to the members – who pay for the wine as well as membership fees. The membership fee covers the areas of discount accommodation, wine tourism holidays, and discounted wine. The Hunter Valley has a journal that is also posted out to the members (in the wine box) that promotes the wines, wine tasting notes, and in particular promotes the areas and wine tourism destinations, this includes festivals and the wine trails.

The Hunter Valley wineries have organised themselves to promote the region, with wine memberships, wine trails, festivals, concerts, (jazz, opera or classical), wine tastings and cellar door sales (Skinner 2003).

The Granite Belt can learn also from the New South Wales wine tourism industry by having different festivals, various types of music in the vineyards, and mixing this with fine cuisine and wine trails. Accommodation and restaurants are extremely important in the wine tourism industry; this has become apparent when looking throughout the world and the Australian wine tourism industry.

Queensland

The Queensland wine industry has ten areas that ‘spread throughout central and south east Queensland’, these are the South Burnett, Darling Downs, Central Queensland/Bundaberg and Districts, Sunshine Coast and Hinterland, Gold Coast Hinterland, Brisbane and the Scenic Rim Wine Districts, the D’Aguilar Ranges, Maranoa Region, North Queensland and the Granite Belt (QLD State Development 2003).

In 2002 by the National Visitor Survey for the National Tourist Review, the trips to wineries in the state of Queensland was 261 000 for domestic tourist and 171 100 for International tourism. In 1999/2000 the direct spending at wineries was \$7M and the regional spending was \$10M (QLD State Development 2003). In March 2003, there were ninety wineries with eighty cellar doors, fifty on site restaurants and/or light refreshments cafes, twenty with on site accommodation within the wine tourism industry in Queensland (Briggs 2003). At a meeting on 19 August 2003, the Queensland State Development and the Queensland Wine Industry stated that there were now 190 wineries and 124 cellar doors in Queensland. The wine industry and wine tourism industry in Queensland is growing at a rapid pace. What of the Granite Belt, what does it have to offer?

Chapter 4

Survey of the Granite Belt Wineries

‘The Queensland wine industry is still considered a new and emerging industry and currently only occupies 1% of the Australian market. The wine industry has recently formed a state body called “The Queensland Wine and Grape Growers Association”. This body will assist with the coordination of the Queensland wine industry with the support of the Department of State Development. Investment in the Queensland wine industry has exceeded 80 million over the past 7 years’ (QLD State Development 2003).

Currently there is the Queensland Wine Project, this project ‘is an initiative of the Queensland Government. Since the project began in April 1997, more than \$60M has been directly invested in the industry. Opportunities for tourism, employment, education, trade and regional development have grown directly due to this investment. The project assists the Queensland Wine Industry Association Inc. develop a successful Wine Tourism industry in Queensland, which will be known for its quality products, investment potential, uniqueness and vision. It will assist the rapid growth of the industry by continually exploring new markets, improving technical excellence and management techniques within the industry’ (QLD State Development 2003).

The Queensland Wine Project is a ‘partnering of government and industry, Queensland has become a vital part of the Australian wine and wine tourism industry. There is a strong commitment to sustainable growth in this State and a passion for the production of consistently high quality wines. The Queensland Wine Project is assisted by:

- the Department of Primary Industries
- Queensland Tourism

- Department of Tourism, Sports and Racing
- Queensland Wine Industry Association
- Regional Wine Industry Associations
- The National Wine Tourism Committee

Regional State Development Centres (Departments with State Development (Office of Industry Development, Trade, Small Business, Investment and Corporate Communications)’ (QLD State Development 2003).

The Queensland Government has produced Fact Sheets on wine tourism. Wine tourism affects all in a region. It is not only associated with cellar door wineries, but all businesses that are involved in Wine, Tourism and Associated industries in the wine region. ‘This includes accommodation houses, tour operators, gift shops, national parks etc.’ As Queensland is known as a tourist destination, the government has tried to re-enforce this as a positive within wine tourism, ‘the advantage of already having an established tourism industry. Many wineries don’t appreciate how involved they are in the Tourism industry’ (QLD State Development 2003).

The combination of food and wine throughout the world has been highlighted as a tourism venture, and the Queensland government has stated that ‘an area that most regions have identified as important to meeting customer expectations is the need to integrated wine with quality food. There is no question that food plays an important part in adding to a region’s ambience and unique character. To obtain long-term success, each region needs to focus on defining their point of differences, rather than trying to outperform another region. Identifying and consistently delivering a unique wine experience is what each region must strive to achieve’ (QLD State Development 2003).

Wine tourism in Queensland has been growing throughout the last few years, and in 2003 the Queensland State Development Department organised a Queensland Wine Conference that covered many areas of wine tourism. The Conference looked at promotions/marketing of wineries, the branding of wine regions (regional branding) and how other areas were marketing their wineries. One area in particular that was focused on was the Hunter Valley and its wine tourism strategies. From this conference there have been many discussions between the wineries of how the area should go forward. Most of these discussions have been based on the paper that was released from the conference and hear say, as there were only 25 people at the conference and of these 12 were high school students.

The high school students were from Stanthorpe State High, a school clearly looking at the direction of wine production and wine tourism training. Stanthorpe State High School is currently working with Dalby Agricultural College and the Southern Queensland Institute of TAFE in the training of their students through the full process of wine, from growing to production to the cellar door outlet. Stanthorpe State High School currently has its own vineyard, and worked on a submission to the Queensland Government for a Centre of Excellence, a Wine Centre, for the purpose of studying and training. ‘The proposed centre includes a cellar room, cellar door and interactive display centre, a commercial kitchen, a function room to seat 150, an outdoor café/classroom and a computer room. Project partners include Stanthorpe Shire Council, Australian National Training Authority, Southern Queensland Institute of TAFE, Dalby Agricultural College and Queensland Wine Industry Association’ (Campbell 2003).

September 2003 saw ‘the Queensland Wine Industry Association conference held at Highfields, near Toowoomba. At the conference the industry was told it needed to work with marketing partners to gain strength. Queensland Tourism Minister, Ms. Merri Rose was a keynote speaker at the event, and told the assembly that wineries and wine regions needed “to be able to provide a range of services such as food, accommodation, tours and souvenirs to meet visitor demands. With 85% of

Queensland wine being sold to domestic customers, the importance of something to go with wine was even greater for the Queensland industry. “By working together, both small and large businesses, producers and wine merchants can promote each others’ product, restaurants, accommodation houses, local produce, arts and crafts, historical sites and the natural features of their locale.” Food and wine assets helped to create a certain “ambience” for a tourism region’ (Free Time 2003).

In 2002 there were 114 wineries in Queensland this has now grown to 126 wineries. Cellar door outlets in 1998 were 38, now in 2003 this has grown to 132 (Free Time 2003). The above is conflicting information from that of the wine training meeting with the QLD Wine Industry and the QLD State Development Department. The cellar door could have increased by the extra 8 within a month, but the difference in wineries is a decrease of 34. The wine industry in Queensland is growing, in the Granite Belt region new vineyards are being planted continuously, new wineries are being built. How and what is the Granite Belt doing about wine tourism, how are they approaching the merging of these two industries?

The Granite Belt region is a region of contradictions, including the tourist information associations. There are currently two tourist associations, one that represents the whole of the Queensland Southern Downs. The Queensland Southern Downs Tourist Association (SDTA) covers the surrounding areas of Toowoomba, Boonah, Beaudesert, Aratula, Inglewood, Warwick and Stanthorpe. The other tourist association is the Granite Belt Tourist Association. The Granite Belt tourist association specialists in the local area, the local tourist attractions, whether man made and/or natural, restaurants, wineries and the accommodation facilities. Both tourist associations have paid membership; membership gives your establishment inclusion in different advertisements and promotions.

With two tourist associations, the two have different agendas, and the two associations appear to be working in different directions with little communication. Many of the local tourist operators and wineries are in both associations, but others try to work out which association would best meet their business needs. Between both associations' promotions of the wineries in the Granite Belt area, one would expect to see 34 wineries, yet one drives around the area, and the wineries are closer to 40.

Wine tourism in the area was started after the Queensland's Winemakers' Association (QWA) was formed in 1972. In 1973 Puglisi Cellars opened the doors for wine tastings and cellar door sales; this winery is now known as the Ballandean Estate winery. In 1985, Australia's first 'District Wine' was released, the launch of "Ballandean Nouveau." In 1987, the Stanthorpe Agricultural Society's Wine Show became national, this has become known as the Australian Small Winemaker's Show and in 1998, the Wine Industry Exhibition opened at Stanthorpe Show, with the then 23 established wineries on the Granite Belt (SDTA 2002).

'Every year on the first and second weekend of October the industry has its "Spring Wine Festival" attracting many wine and food enthusiasts to the region. This is followed on the third weekend by the "Australian Small Winemakers Show" attracting over 900 entries involving every State in Australia. The first Sunday in May boasts the extremely successful "Opera at Sunset", attracting over 2000 opera and wine lovers to the wineries. The Granite Belt region is a unique contributor to Australia's wine industry' (Hardy 2001).

Map 4.1 The Granite Belt Wine Route and Food Trail



Source: The Ultimate Guide 2003 2nd edition

There is a recognised wine trail on the Granite Belt that includes 40 wineries on the Queensland side of the border and another 4 wineries on the New South Wales side. Expectations are that in 2004, another 10 to 15 wineries will open on the Granite Belt.

The Heritage Estate winery, situated on the Fruit Run, Tourist Drive, Cottonvale, 15 kilometres north of Stanthorpe. Bryce and Paddy Kassulke converted a cold storage facility that was built in 1947 as the first apple cold storage area for IONA IXL. The winery has been filled with antiques, and amongst all this finery is the tasting area. The winery was opened for business in Easter 1992. The winery is a 'small, boutique, family-owned winery. The winery specialises in barrel fermentation reds and whites, as well as fortified wines' (Ultimate Guide 2002). This winery has a large car park that caters for both buses and cars. Within the tasting area a section has been converted to cater for the drivers and non wine drinkers, a variety of coffee styles and small refreshments. Wine dinners, lunches and brunches are all catered for, but bookings for these larger events are required. During the cooler months, a large roaring fire warms the tourist on entry into the winery, and also creates an atmosphere that is complimentary to wine tasting and the environment. 'The Heritage winery also has the Heritage Cottage, a 130 year old cottage positioned in a bush setting, perfect for the romantic getaway with a cosy log fire and peaceful verandah' (Heritage Wines 2003).

The Stanthorpe Wine Co., (a joint business venture) now incorporates the Summit Estate as part of the winery. The winery is situated on the Granite Belt Drive, Thulimbah. 'The centre is nestled amongst nature, stone fruit and apple orchards. The centre has a large antique cast iron fire to warm you in winter and a Regional Art and Craft Gallery' (Hardy 2001). Coffee and snacks are available, as well as an educational guided tour of the vineyard with 9 different grape varieties.

The centre is different in its approach to wine tasting, it has a large counter section, actually a bar, but the management prefers to have the wine tastings in a separate room where the tourist can be seated, whether as individuals and/or bus groups. The

staff at the centre are trained to know what the client is expecting and to exceed their expectations. The Centre has many specialist functions, such as pageant festivals, these festivals are based on different sectors of the world which then enables the winery to work out the specialist cuisine and the wine matches for each course. This wine centre caters for bus tours especially, and works with numerous bus companies and tourist outlets, also a car park is available, all tourist are encourage to drop in.

The Summit Cellars, a satellite winery; is also situated on the Granite Belt Drive, Thulimbah. On the Food and Wine guides this is an actual winery, yet it has a shop front for tastings and sales for the Windermere Wines and Vineyards at Ballandean. There were no set opening days and times for this winery satellite shop.

The Castle Glen vineyard is at Amiens Road, The Summit. The Castle Glen was established in 1990, and opened in June 1995. The Castle Glen is situated on 40.5 hectares, 12 kilometres north of Stanthorpe. The Castle has been designed to create an atmosphere of medieval times. When Castle Glen was originally designed, the focus was on many aspects of hospitality and tourism. The Castle was built with a function area, a licensed restaurant, barbeque facilities, open log fireplaces and accommodation – self contained two bedroom units that are secluded and private, set amongst the grapes. Castle Glen in 2003 changed ownership, but prior to leaving the previous owners had passed by council, a new section to be built, including a cinema, full size billiard room, hot tubs and spas, a holiday destination within a vineyard. The new owner is looking at the accommodation and function side to increase the wine tourism side of the business. The winery currently is specialising in fortified fruit wines and with the next season will be increasing the grape wine varieties. Tours are available to see how the wines are made, from the grape harvest to the tasting room. The tourist can prune the vines from June till September and see wine making for the rest of the year. The winery is focusing on the visitor enjoying their facilities and enjoying being involved with the wine making process and naturally leaving with many cellar door sales. The cellar door is open for tastings and sales every day of the week.

Boireann Winery is situated on Donnelly's Castle Road, The Summit, and is open daily. The vineyard was established in 1995 and the cellar door was open in 1999. The winery is a family operation. Boireann specialises in 8 varieties of wines, and has parking for cars and buses. This winery is a bit off the track and the entrance is more for buses and four wheel drives rather than the family sedan. The winery and the cellar door are totally encompassed as one; the tourist would be involved in the wine making process on entry at the cellar door. The cellar door is a small building that encompasses the crush, the fermentation and the maturation.

The Old Caves Winery is situated on the New England Highway, just north of Stanthorpe. The winery is a family business and is open daily for tastings and cellar door sales. They cater for light refreshments and full meals as long as all is booked in advance. The vineyard is 5 hectares, this is the winery that first contracted grape growers to meet there needs in this community. Most of their grapes are locally grown and delivered to the winery for crushing. The cellar door has their own wines for tastings and sales, as well as local jams, fruit specialities, local pottery and crafts for sale. This winery supports the local industry and community, and is a member of both tourist associations as well as the Queensland Wine Association. The winery also specialises in commemorative bottling of their wines into whatever label a client wishes to have, whether this be for a wedding, a promotion, a christening. The winery caters for group bookings and will try to meet whatever the client (tourist) wishes (Old Caves 2003).

The Robert Channon Winery is situated 8 minutes from Stanthorpe's centre on Amiens Road, Stanthorpe. Award winning wines, and open to the public for tastings and cellar door sales, Friday through to Monday, and other days by appointment. They can cater for light lunches, or bring your own and enjoy the courtyard overlooking the lake and hills (Channon 2003).

Casley Mount Hutton Winery, is situated on Mount Hutton Road, 12 kilometres on

the Texas Road, close to Stanthorpe. All the grapes are grown in their vineyard for their wines. The attraction is to ‘discuss wine making techniques with the resident winemaker’ (Casley Mount Hutton Winery Brochure 2003). This winery is open Friday, Saturday and Sunday, or by special appointment.

The Catspaw Farm Winery is the first winery in the area to charge for wine tastings (refundable on purchase) which is a new concept for this area. This winery is situated on Texas Road, approximately 15 kilometres from the Stanthorpe Industrial Estate. Besides the wine tastings and cellar door sales, this winery is ‘situated on the boundary of the traprock and granite country in gardens overlooking three large dams’ (Catspaw Winery Brochure 2003). This winery is open Thursday to Sunday and some public holidays, as well as by appointment.

Emerald Hill winery is situated a few kilometres away at 218 Donges Road Severnlea, 7 minutes from Stanthorpe. Emerald Hill Winery is open for tastings on weekends and most public holidays. Cellar door sales and tastings are available, and all the wines are made on the premises.

Whiskey Gully Wines is situated on Beveley Road Severnlea. The winery is on one of the ‘district’s oldest station properties with sweeping views of the Severn Valley. Excellent premium wines are available and the 1880s colonial homestead has a fine food restaurant/café,’ set in ‘lovely gardens and orchards’ (Whiskey Gully Wines 2003).

Severn Brae Estate Winery is situated at Back Creek Road Severn. The vineyards were established in 1997, this is a modern vineyard. This winery has traditional and interesting wines, as well as a café for lunches, coffee and home made cakes (Severn Brae Estate Wine 2003).

The Severn Brae Estate Winery has an interesting history of being the original catholic school and home for the nuns in the Stanthorpe area. Inside the café/wine

tasting area, the ceiling has remained as it originally was, one can view the size of the bedrooms for the nuns (cells) and the original setting of where the class room/s was. This building was removed to the race track and then to its current site. The staff at the winery can tell the story of where everything originally was, when the moves occurred, and how things were changed and why. Wine tasting, light refreshments and an interesting local history lesson are available.

Thunderbolt Farm is located 10 kilometres from Stanthorpe at 679 Thorndale Road. Thunderbolt Farm is open from Thursday to Tuesday from 10.00am to 5.00pm. 'Relax on our terrace overlooking the vineyards and farm animals. Enjoy the views down the valley to Stanthorpe; morning and afternoon tea; lunch and snacks and wine tastings and cellar door sales' (Thunderbolt Farm brochure 2003).

Kominos Winery is located on the New England Highway at Severn, 9 kilometres from Stanthorpe. The first plantings were in 1974 and have continued to be rewarded for its efforts in the wine industry. Numerous trophies have been won over the years, and recognition for their efforts to the local wine industry and the Granite Belt are in promotions. The property has 10 hectares of vineyards producing highly regarded European varieties. You can visit the winery cellar door and enjoy some wine tasting daily. They have a "Natural" tasting room on the property (Hardy 2001).

Jester Hills Winery is situated at Mount Stirling Road, Glen Alpin. A family run boutique winery; the first vines were planted in 1993. Approximately 5 hectares are planted for their vineyard, and all are hand pruned and hand harvested. The cellar door is open for tastings and sales from Friday to Monday.

Mountview Winery is situated on Mt Stirling Road, Glen Alpin. Mountview wines is 'set among Pine trees, the red cedar barn style winery enjoys great views and stands on the site of the original Mountview vineyards established in 1921. Visitors entering the wine tasting room are cosseted amidst the range of winemaking equipment and

oak barrels, providing that authentic winery experience' (Hardy 2001).

Mountview wines are open for tastings and cellar door sales on Friday through to Mondays, school and public holidays, and on request. They can cater for groups, functions and lunches, all by appointment. They cater for the family, as in covered verandahs, picnic tables and children's play area, barbecue and of course with the cooler climate, a winter log fire. Mountview wines also do commemorative and corporate labelling.

Felsberg winery is located on Townsends Road, Glen Alpin. The winery is 'spectacularly located on top of a precipitous Ridge, looking out over the Glen Alpin Valley. The tasting and hospitality areas have truly breathtaking views' (Hardy 2001). The hospitality area serves light lunches and refreshments. The winery was commenced in 1983 and the vineyard now has 7.5 hectares under vine and the winery was completed in 1991. Tastings and cellar door sales are available 7 days per week.

The Bramble Patch, specialises in fortified berry wines and liqueurs, jam, coulis, vinegars, sauces, ice creams, and yoghurts, all made with the berry fruits from the farm, as well as grape wines. The Berry Patch is situated on Townsends Road, Glen Alpin. The Bramble Patch is open for tastings; door sales, light refreshments, and the tourist can walk amongst the berries that are growing through hydroponics (Bramble Patch 2003).

Rumbalara Vineyards on Fletcher Road, Fletcher, was founded by Una and Bob Gray in 1974. The original Grays have recently retired. Therefore the winery has changed ownership in 2003, the new owners are originally from South Africa, and had a winery there. Rumbalara, "the end of the rainbow," is a winery that has an interesting history on the Granite Belt. The vineyard was purchased as a 58 hectare vineyard and orchard named after Thomas Fletcher who sent the first Granite Belt grapes to the Brisbane markets in 1874. Rumbalara winery has a close association with many of the wineries in the district as the Grays were involved in the original exports of

Granite Belt wines to Japan for promotional reasons, as well; they work with other wineries for various blended varieties of wines. Rumbalara has an attractive tasting room, and outdoor terrace tasting area, picnic area, and a barbeque. The winery is open for tastings daily, and sales are available at the door. A tour can be organised of the winery if prior notice is given (Stanthorpe Border Post 2002).

Wild Soul winery is located at Horans Gorge Road, Glen Alpin. The vineyard is 1.3 hectares, and is all hand tended (Wild Soul 2003). The next is Freeman Estate Wines on Bents Road Ballandean. The winery is ‘located amongst the hills of Ballandean with the Severn River running through its parkland setting’ (Freeman Estate Wines 2003).

Aventine Winery is situated on Wattle Road Ballandean. The Aventine Winery is open on weekends and public holidays from 8.00am to 6.00pm. The theme that is present throughout the vineyards is of the old wooden carts and barrels, old equipment set to highlight the vines and the grounds (Aventine Wine Brochure 2003).

Severn Hills Vineyard is ‘situated in the beautiful Severn River Valley, the vineyard forms the approach to the village of Ballandean which prides itself as being the epicentre of the granite belt wine industry.’ The winery is on the corner of Bents and Sundown Roads in Ballandean. This winery is part of the Mount Tamborine winery. The original grapes for the Mt Tamborine wines were grown on the Granite Belt and made on Mt Tamborine. This has now grown so that Mt Tamborine has its own vineyards, as well as the Severn Hills Vineyard. Wines are made at the Severn Hills Vineyard, winery tours of the Severn Hills vineyard and tastings of both Severn Hills and Mt Tamborine wines are available, Thursday through Monday from 10.00am to 5.00pm (Mount Tamborine Vineyard and Winery Brochure 2003).

Bungawarra winery is situated on Bents Road in Ballandean, in amongst granite boulders and a granite background. The name Bungawarra is from the Indigenous dialect meaning, “Granite rock by shallow water” (Barrawarra Brochure 2003). The winery is open for wine tastings and cellar door sales, a picnic section, barbecue and

toilet facilities are available for the tourist. ‘The vineyard is over 100 years old and still supplies all Bungawarra’s grapes’ (Bungawarra Wines 2003).

Cody’s wines are situated on Zambelli Road, Ballandean. The actual Cody’s winery is open by appointment, but the wine tastings and cellar door sales go through their satellite shop front on the Highway at Ballandean, at Cody’s Café. Cody’s winery has been described as ‘the ultimate Granite Belt wine tourism experience. With a passion for quality not quantity, handcrafted wines can be complimented by a stay at the superb Cody’s folly’ (Cody’s Wines 2003).

Mary Byrnes winery is situated on Rees Road Ballandean. Hidden Creek winery is situated on Eukey Road, Ballandean, and is open for tastings and cellar door sales daily, Monday to Friday 11.00am to 3.00pm and on week ends 9.00am to 5.00pm. Hidden Creek Vineyard/Winery has a high profiled winery and café that is promoted throughout the region. The winery’s café is open for lunch by the lake, and functions are also held at the Hidden Creek winery. The winery is on 16 hectares of land and approximately half of this is planted with vines. The winery is set up to cater for the tourist and for the special functions that many may desire (Hardy 2001).

The Granite Ridge winery; formerly known as Delana – Ferguson Estate Wines, is situated on Sundown Road Ballandean. ‘The winery is housed in a pretty ‘Australiana Style’ Building surrounded by landscaped native gardens resplendent with large wine barrels at the entrance’ (Hardy 2001). The winery is open daily for tastings and cellar door sales, and the tastings take place from the pleasantly rustic wooden tasting bar. ‘You can see all the winemaking processes, from crushing to fermentation, maturation, bottling and labelling going on around you as you taste’ (Hardy 2001).

Winewood winery is situated on Sundown Road Ballandean. The winery is open on weekends and public holidays. This is a family run vineyard and winery (Winewood 2003).

Ballandean Estate winery is situated on the Sundown Road at Ballandean. The original winery was planted in the 1930s by the current owner's grandparents. Working within the vineyards and the winery, the third and fourth generation of the family have established a winery that has wine tastings, wine tours of the establishment, a small wine museum, a café with coffee and light refreshment and cellar door sales. In 1968 the second generation opened the winery as Ballandean Estate wines, and has consistently been the winner of the Queensland Tourism Awards, 1996, 1997, 1999, 2000, 2001, and 2003. The winery is open daily for the tourist to enjoy, and since 1993 has hosted 'a magnificent opera overlooking their vast vineyard and Sundown National Park. "Opera in the Vineyard" is an open air, charity event attracting over 2000 guests. It is held during the first weekend in May each year. "Jazz in the Vineyard" is another annual event held at Ballandean Estate. This fabulous afternoon of entertainment is a must for jazz lovers and is held early each year' (Ballandean Estate Brochure 2003).

The Golden Grove Estate winery is situated also on Sundown Road, at Ballandean. This winery is open daily for the tourist and coaches by appointments. The vineyard was purchased in 1986, and most of the table grapes were removed in 1991 and replaced by wine grapes. 'In their hospitality area they hold many pre-booked and special functions, such as 'Sicilian Vintage Lunch' and a 'Walk In The Cloud's' re-enactment, they also have a cook your own barbecue facility' (Hardy 2001). This is the home of Queensland's first wine club, established in 1998. They have numerous different social events and dinners, as well as discounts for their wine club members (Golden Grove Brochure 2003).

The Robinsons Family Vineyard on Curtins Road Ballandean, 16 kms from the Queensland New South Wales border, about 20 minutes from Stanthorpe. The winery was established in 1969, and now has 14 hectares of premium grape varieties. All the wines are produced on the winery, and only the grapes that are grown on the property are utilised in their wines. Tastings and sales are available through the cellar

door and / or mail order. The winery is open daily for the tourist (Hardy 2001; Robinson Family Vineyards 2003).

Bald Mountain Vineyards is situated on Hickling Lane, Wallangarra, right on the border of New South Wales and Queensland. The above wineries are all on the current Wine Tours for the wineries in the region, yet one winery on the brochure had merged with another and 8 wineries were not even on the list for the tours. So what else is available for the wine tourist on the Granite Belt?

There is Pyramids Road Wines, situated on Pyramids Road Wyberba, 'set in the foothills of Girraween National Park' (Pyramids Road Wines Brochure 2003). They have a large tastings room, with a viewing section, that one can watch as the wine is being processed. The establishment is new, and has a fireplace to keep the tourist warm and to create atmosphere. The winery is open on school holidays and weekends for tastings and cellar door sales.

The Inigo winery is located on the New England Highway, Glen Alpin. This winery was sold in late 2003 and has since painted over the wine signs, and shows no sign of opening to the public.

The Lucas Estate winery on Donges Road, Severnlea, has just been sold and changes ownership in September 2003. The Lucas Estate winery is open daily from 9.00am to 5.00pm for tastings and cellar door sales.

Stone Ridge Vineyards on Limberlost Road, Glen Alpin, is open for tastings and cellar door sales. Windermere Wines and Vineyard at Watters Road Ballandean is open daily from 9.00am to 5.00pm for tastings and cellar door sales. Windermere Wines has the satellite winery on the Granite Belt Drive known as the Summit Cellars. There is also the Tobin and Ricca Wines located at the corner of Sundown and Ricca Roads in Ballandean, as well as the Sundown Valley Vineyards on Sundown Valley Road Ballandean.

Preston Peaks winery is located on the Old Wallangarra Road Wyberba. The Preston Peak winery has two vineyards, one at Preston near Toowoomba and the other at the Wyberba vineyard on the Granite Belt. The winery was once open for tastings and cellar door sales at Wyberba, but now all their tourism areas are at the Toowoomba premises. The actual winery is still operating and has a resident wine maker who produces the wines and then when ready the wines go across to the main Cellar Door at Preston near Toowoomba. You can go through the winery at Wyberba only by appointment, and have tastings and cellar door sales. Therefore on the Granite Belt there are 40 currently operating wineries.

Wine regions throughout the world, including Australia, have discovered that not only can you sell wine via wholesaling, but wine tourism is a direct revenue sector. Direct sales through the cellar door, wine tours, wine tastings, are all a part of wine tourism. Wine tourism can enhance the wineries business. Many wineries can see the future potential in wine tourism, another source of revenue, actually a cash flow business rather than waiting for wholesale businesses to pay accounts. Wine tourism is a way to have future sales by clients remembering their experiences at the wineries, then buying off the shelf at wine outlets or/and by direct sales and mail order. Do the Granite Belt wineries see tourism as a viable industry at present and for their future?

When summarising the wineries on the Granite Belt, it is one long wine trail. There are tastings and cellar door sales, wineries that are open by appointment and numerous wineries that are only open on the weekends and school holidays. With only a few wineries having any light refreshments, cafes, hospitality beyond the wine tastings and sales, are the wineries really interested in wine tourism?

Chapter 5

Methodology

The process utilised in this research thesis was a ‘correlation research’ method. What is the relationship between tourism and wineries in the Granite Belt area? What are the quantitative variables? The ‘correlation research’ method was primarily chosen as it describes existing conditions. Correlation research is a type of descriptive research; to what quantitative degree are the variables related? The variables in this research are the tourism industry and the wine industry on the Granite Belt.

Sample

Wine Industry

‘Sampling is the process of selecting a number of individuals for a study in such a way that the individuals represent the larger group from which they were selected’ (Gay 1987). For the wine industry on the Granite Belt the sample selected was the whole of the wine industry population. As the whole Granite Belt wine industry is quite manageable with only 40 operations a full sample was permissible and also this way all wineries are represented; therefore no group could be missed. The Granite Belt wine industry includes wineries from Dalveen through to the Queensland/New South Wales border, as in Map 1.2.

As stated above the sample for this research has been all the wineries in the Granite Belt, thereby enabling a clear and full sample as there are many different headings that the wineries could fall under. The sample was collected via the internet, wine brochures, tourism brochures of the area, and driving around the region.

Tourism Industry

The sample for the tourist industry on the Granite Belt was based on the Tourist Associations, which represent different members within the local and outer regions. This way it excluded the hospitality industry such as the accommodation, restaurants and other tourist attractions. The sample was collected via the phone book and talking with people in the area.

Measuring Instrument

The method used to collect the relevant data was a structured interview. 'An interview is essentially the oral, in-person, administration of a questionnaire to each member of the sample' (Gay 1987). Interviews 'can produce in-depth data not possible with a questionnaire...the interview is flexible; the interviewer can adapt the situation to each subject. By establishing rapport and a trust relationship, the interview may also result in a more accurate and honest response since the interviewer can explain and clarify both the purpose of the research and individual questions. Another advantage of the interview is that the interviewer can follow up on incomplete or unclear responses by asking additional probing questions. Reasons for particular responses can also be determined'(Gay 1987).

Wine Industry

The interview questions were developed and administered by the writer. A trial structured interview for the wineries was tested on the newest winery to open just prior to the interview stage of this thesis. This wine operator is currently undertaking studies in wine tourism. From this trial, minor changes were made to the questions, one area was in how to ask the questions, such as give time to the wine operator to think and answer, this was taken into account and changes were made in this area. Originally the questions were

printed, and a copy was to be given to the winery personnel and questions asked whilst interviewer and interviewee had a copy of the questions. It was suggested that no copy of the questions to go to the interviewee, since with written questions the wineries would give more structured answers. The suggestion was to just ask each question and let the conversation flow, this way the interviewer could get more realistic and honest answers. This suggestion was taken into account and would be followed throughout the interview process. The structured interview would be recorded by the interviewer writing down the responses on the question paper. The structured interviews would produce primary data and then other relevant information could be utilised as secondary data.

The structured interviews took place at the individual wineries; with the writer travelling to each place. The interviews took between 30 minutes and an hour for most of the wineries, although a few wineries took longer. The structured interviews for the wineries produced a reliable measure as there was 'consistency with which the test measures,' (Gray 1987) as all wineries had the same interview questionnaire. All data from the questionnaire were collected and analysis via actual percentages and the hard data that the writer recorded. Many wineries personnel had feelings and thoughts, these could not be measured, but a comments section was recorded for this area.

The validity of this structured interview with all the wineries was consistent and measured the following areas:-

- What is the nature of their business - whether this be grape growing; and / or processing of the grapes to wine; and / or wine tourism (%) - whichever section the vineyard/winery/tourism falls under will be divided into sections and percentages
- Did the owner operate the wine business (%)
- When and if the wineries were opened to visitors (%)
- What days the operations are open for the tourist side of the business (%)
- Were the wineries personnel proactive or reactive to wine tourism (%)
- How many operations does the winery have – (in the wine sector of business)(%)
- If the wine tourism operation/s has cafes, restaurants, and cellar door areas (%)

- Whether the vineyard/winery is a family concern and (operated and/or) how many staff are employed specifically for the tourism side of the business (%)
- What year had the winery started
- What year had the grapes been planted
- What year had the wine production commenced
- When did the vineyard/winery commence – opened for wine tourism (%)
- The effect of wine tourism on their business (%)
- Attitude towards wine tourism (%) – positive / negative
- Growth within wine tourism (%)
- How to promote wine tourism and who is responsible for this – measuring will be completed in this section by similar answers and if all the wineries are focusing in the same directions (%)
- The future potential in wine tourism within the region – similarities between the wineries and their focus (%)
- % of the sales of the winery via the cellar door
- Wine tourism as a major component of the business (%)
- Who are the clients for the wineries – age; gender; professions (%)

Tourism Industry

The interview questions were developed and administered by the writer. The structured interview for the tourism industry was tested with a local hospitality and tourism operator. The questions required minor changes and the same suggestion of how to ask the questions was discussed. As with the winery questionnaires, originally the questions were printed, and a copy was to be given to the tourism personnel and questions asked whilst both parties had a copy. It was suggested that this not happen, as the tourist operators would give more structured answers, just let each question be asked and let the conversation flow and the interviewer could get more realistic and honest answers. This suggestion was taken into account and would be followed throughout the interview process. The structured interview would be recorded by the interviewer writing down the responses on the question paper. The structured interviews would produce primary data

and then other relevant information could be utilised as secondary data.

The structured interviews took place at the individual tourist operator's venue. The writer travelling to each place and the interview took between 30 minutes and an hour. The structured interviews for the tourism industry are a reliable measure as there was 'consistency with which to test measures,' (Gray 1987) as all tourist operators had the same interview questionnaire. As the tourist operator's feelings and thoughts cannot be truly measured, all the measuring was collected and analysed by the hard data that the writer will record.

The validity of this structured interview with all the tourist operators was consistent and measured the following areas:-

- What the client wishes to do whilst on the Granite Belt
- Any recommendations from the tourist operators
- Five top attractions that are recommended
- Improvements to local tourism
- Length of stay on the Granite Belt for the clients
- Wine tourism and the potential growth
- Intra-state, Interstate, International clients
- Wine tourism and their business
- Length of time that they have been involved in the tourist industry
- Who are the clients that they deal with – gender, age, profession.

The answers to the structured interviews enabled the writer to analyse the answers recorded. From the information gathered, data were prepared showing the relationships of the above in graph format, in percentages, as well as in a matrix. The matrix has the information as an overview summary of all the information. In this way data can be compared between the wineries and the relevant information from the tourism industry. Within the structured interviews, there was a section for any extra comments, this section was headed up as an extra comment section.

From the data gathered above, the writer was able to see if the Granite Belt is doing anything different from the rest of Australia and that of the world. Also the data enable the recommendations of where to next via the comments and the data gathered, as well as any future researches.

The following are the two questionnaires that were utilised in the structured interviews.

Structured Interviews for the Wineries

- Q1. Is the winery open to visitors?
Yes No
If yes, what days and hours?
Why did you choose these days and times? (Seasonal?)
If no – What would make you open your winery for visitors?
- Q2. When did you decide to go into Wine Tourism – Cellar Door Opening? (pro-active/reactive)
- Q3. What is the nature of your business?
Production of grapes only
Production of grapes and Wine processing
Production of grapes, Wine Processing, & Tourism Attraction
- Q4. How would you define yourself – as one of the following –
Winery operator
Winery owner and operator
Winery owner and/or operator and wine tourism personnel
- Q5. How long has this establishment been operating as a winery?

- Q6. How long has this establishment been involved in wine tourism?
- Q7. This operation/those operations – do they have cafes, cellar door sections?
- Q8. Do you employ staff especially to deal with the tourism side of your business? If so, how many people are employed?
- Q9. How does wine tourism impact on your business? eg % of sales at cellar door.
- Q10. How does wine tourism affect your business?
- Q11. How do you feel towards wine tourism?
- Q12. Would you like to see growth in wine tourism?
- Yes ☐ No ☐
- Please comment on your answer.
- Q13. How many operations do you have?
- Q14. How would you like to see wine tourism promoted? Who should promote this?
- Q15. Can you see a potential future in wine tourism?
- Yes ☐ No ☐
- Comments on the above answer
- Q16. Is wine tourism a major component of your business?
- Yes ☐ No ☐
- Q17. What would you like to see in the future in regards to wineries and wine tourism?
- Q18. Who are your clients – eg Age, profession, couples/singles, gender
- Any further comments:

Structured Interview – Tourism Operators within the Granite Belt Region

Q1. What do your clients normally want to see and do on the Granite Belt?

National Parks

Wineries

Dams

Farms

Other – please state

Q2. Do you recommend any particular area (clarify) of tourism to your clients?

Q3. Could you please rate the top 5 things that you promote within the area?

Q4. What would you like to see improved in local tourism?

Q5. What is the average length of stay of your clients visiting the Granite Belt that you deal with?

1 day

2 days

3 days

1 week

other

Q6. Do you see wine tourism as a potential area of growth?

Yes

No

Please comment on your answer

Q7. Do you know what percentage of your visitors that you deal with are – Intra-state, Inter-state, International?

Q8. Would you like to see wine tourism grow?

Yes

No

Reason for your answer

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Q9. Does wine tourism affect your business?

Yes

No

Please explain your answer

Q10. What percentage of your business is related to wine tourism?

Q11. Of these tourists, what is the general age, occupation, & gender?

Q12. How long have you been in the tourism business?

Q13. Any further comments

Chapter 6

Survey and Analysis

The data collected from the structured interviews were analysed and the combined results are presented in order of the questions asked at the interviews. The larger sample of wine operators has been analysed first, followed by the tourist association managers.

Responses

The population surveyed was 40 wine operations. The sample was 100%, all wine operations were visited. Some data (eg opening times) was collected by the researcher at all 40 wine operations. Only 30 of the 40 wine operations (75%) responded positively to the full survey. The analysis is based on (a) some data from all 40 operations and (b) full data from 30 (75%) of operators.

Two operations could not be contacted, one refused to participate, one was open to the public but no one in attendance to serve the public, four were not available due to not being open during the advertised times, and two were too busy. The positive response rate was 75%. Figure No.6.1 shows the break down of the interviews.

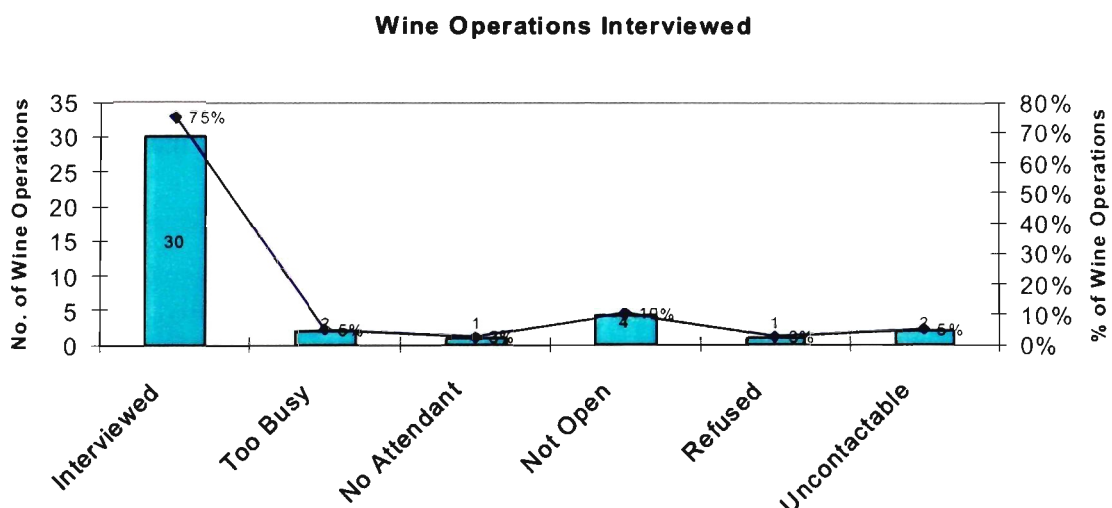


Figure No.6.1

Locations – Settlements and Postcodes

The wine operations are strongly focused in a few particular areas which can be noted by the postcodes. There were two small towns that did not have a postcode, therefore they were incorporated into the closest postcode to them. The towns and postcodes are shown on Figure No.6.2.

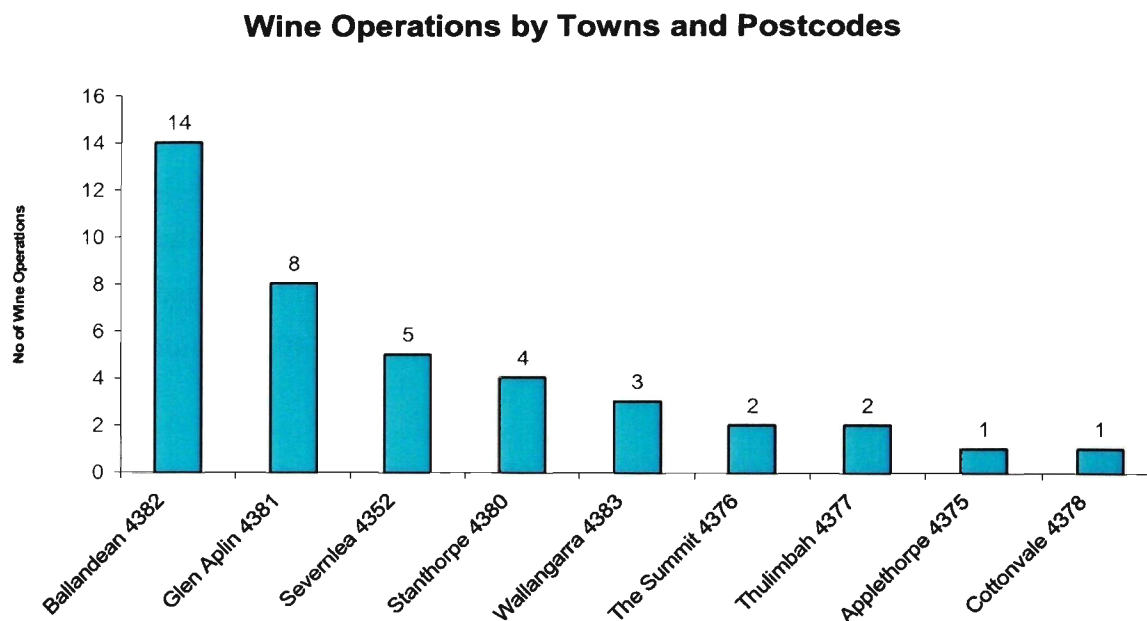


Figure No.6.2

Opening Days and Times

Question 1. Is the wine operation open to visitors? If yes, what days and hours? Why did you choose these days and times? If no, why? If no, what would make you open your wine operation to visitors?

Of the 30 wineries that were interviewed, 20 wineries (66%) open daily. They vary in operational hours from 9.00am to 5.00pm, 9.30am to 4.00pm, 12 midday to 3pm, 11am to 3.00pm, but on weekends most of the wineries (93%) operate for the full day generally 9.00am to 5.00pm. Most of the wineries that only open on weekends, open for the school holidays and public holidays as well. Figure No.6.3 shows the number of wine operations and the days of opening.

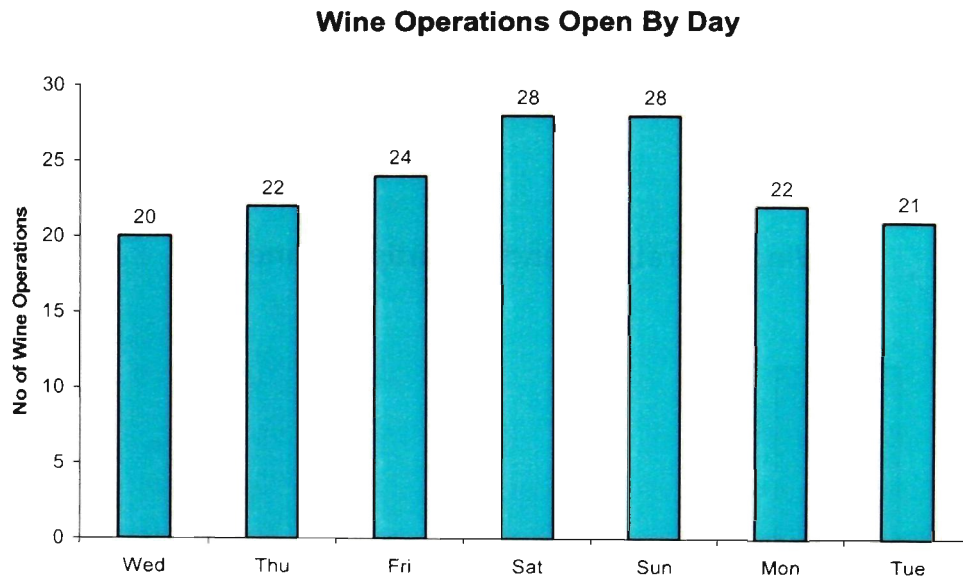


Figure No.6.3

Of the thirty wine operations, two (no. 37 & no. 40) are open by appointment. Wine operation No. 37 is a satellite cellar door and is open when busy periods are expected, eg the Markets on the Mountain and The Farmers Market. They also open during festival periods and special functions that are happening within the district.

Wine operation no. 40 is open by appointment, but would prefer the public go to their tourist vineyard and cellar door in Toowoomba. The vineyard and winery are not really set up for wine tasting and sales. This winery only has the wine makers and the relevant staff for the vineyard present.

Operations where the owner/manager lived on site typically chose to be open at all hours because the owner/manager was on site. One comment made was ‘They are there at home, therefore they may as well be open.’ Another statement was ‘if they had to go to town, or something came up, they would put the closed sign up and go.’ Not sticking to advertised opening hours caused frustration to many tourists. This only occurred with a small portion of the wine operations, but a disappointed tourist is difficult to turn around to the positives of other wine operations being open. Of the 100% of wine operations visited, the writer interviewed 75%. The advertised times of opening and the actual

opening of the wine operations have been recorded for 100%. 32 (80%) of the wine operations were open at the advertised times, 6 (15%) were closed whilst they advertised that they were open, as shown in figure No.6.4 below.

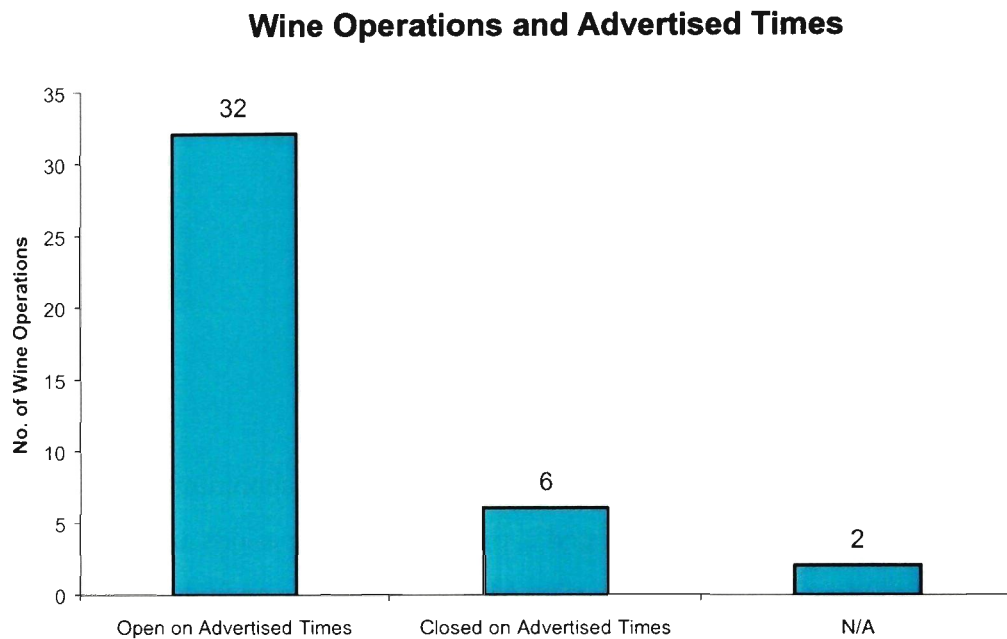


Figure No.6.4

For some of the operations, the opening times and the attitude in regards to opening, such as living there, therefore they may as well open, was all a little lackadaisical when considering the winery – cellar door is meant to be an operating business.

Nature of Operation and Business

Question 2 and 3. What is the nature of your business? How would you define yourself within the wine operation industry?

Of the thirty wine operations (owner/managers) that were interviewed, six did not have a winery. These operations had vineyards and a cellar door but had to send their grapes to wineries to make their wines. Five send their grapes to local wine makers and one sends the grapes to New South Wales for processing. There are twenty-two other wine

operations that all have vineyards, a winery and a cellar door on their premises. Two of these cellar doors are satellite cellar doors located away from the vineyard and the winery. Both are located on main roads for ease to the tourist.

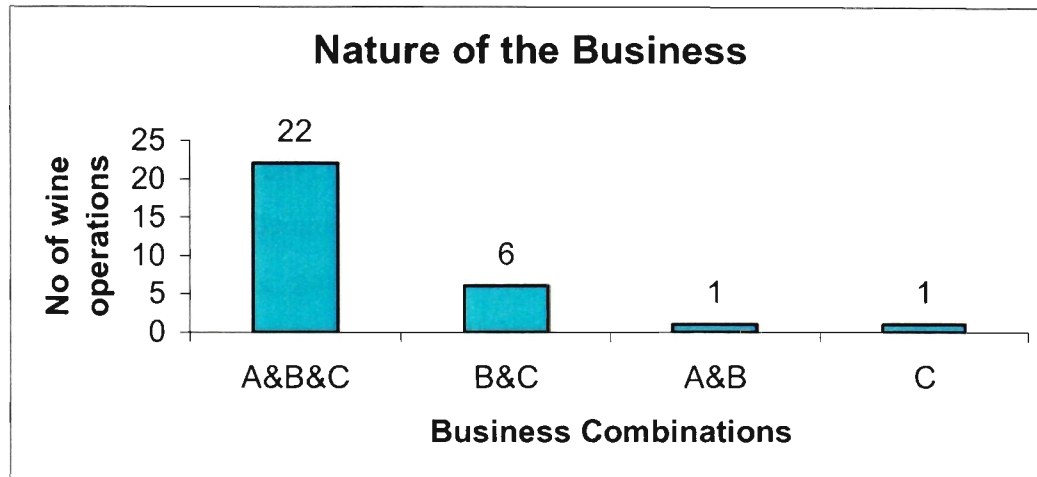


Figure No.6.5

Legion: A&B&C – vineyard, winery and cellar door
 B&C –vineyard and cellar door
 A&B – vineyard and winery
 C – cellar door

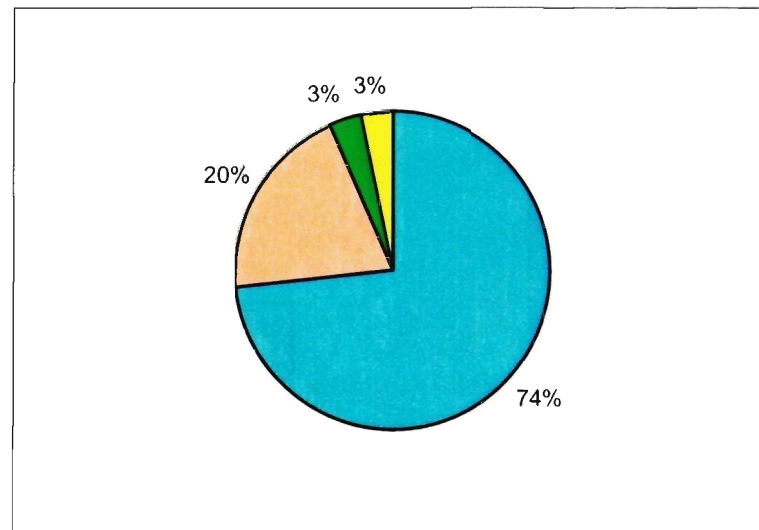


Figure No 6.6.

Legion: Blue – vineyard, winery and cellar door
 Light Tan – Vineyard and cellar door
 Yellow – Cellar door
 Green – Vineyard and winery

Of the wine operations 74% have a vineyard, winery and a cellar door; 20% have a vineyard and cellar door; 3% have a cellar door only and the other 3% have a vineyard and a winery.

Of the thirty wine operations interviewed, 93% were owners and operators. An explanation was required of what the term, wine tourism personnel, meant at approximately 50% of the wine operations. They were advised that because they were dealing with the public at the cellar door they were working in the tourism industry. Some of the wine operations had extremely well trained personnel that had worked in the tourism and hospitality industry prior to the cellar door opening. As the majority of the respondents are viticulturists and had slid into full wine production which logically ended with cellar door sales.

Attitude of Wine Management towards Tourism

Question 4. When did you decide to go into wine tourism? Were you proactive or reactive?

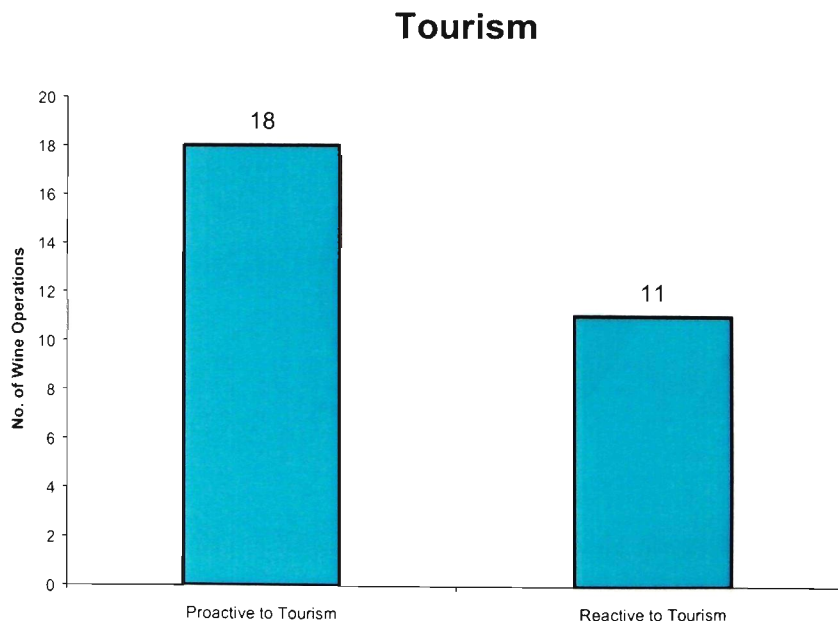


Figure No.6.7

From the interview answers, Figure No 6.7 shows the proactive and reactive responses to tourism. Proactive means that the cellar door was to be open to tourists, this was always the intention of the owner. The vineyard was planted and the winery opened or the grapes sent to be processed, then as soon as possible the cellar door was to be opened. Reactive to tourism meant that the owner, after being involved either in fruit growing, vineyard planting, or hobby, realized that the wine that they were producing had to have an outlet, to return the monies they had invested. These operations then turned to building a cellar door and opening to the public. The number of wine operations that were proactive equates to 60%. These operators realize that wine tourism is essential for the long term financial viability of their operation. On an average of 84% of the wine sales for the wine operations comes from the tourists by sales at the cellar door. The reactive wine operations were 37%. These operations drifted into wine sales as a lifestyle and 3% of operations are not normally open to tourists.

Many of the wine operators felt that being proactive to wine tourism, also meant that they have enhanced the region as a tourism destination, as well as being the main attraction for tourist to come to the region.

Dates of Establishment Operations

In general a normal wine operations establishment would commence with the planting of the vineyard, followed a few years later by a winery being built, then later a cellar door. The planting and the growing of the grapes to achieve the first harvest of enough grapes to make the wine takes two to three years minimum. During this time a winery could be built. The processing and storage time of wine is governed by the variety of grapes to be grown and the variety of wine that the operation intends to make. On average this is normally no earlier than two years from growing the grapes to processing. There are numerous new techniques that can speed up the process, but the above is based on an average general establishment.

Question 5, 6 & 7. How long has this establishment been operating – vineyard, winery and then with a cellar door?

When one looks at the dates of planting the vineyard, the winery opening and then the cellar door, one would have to question the number of operations that stated that they were proactive to tourism.

Wine operations opened at various times over a long period, from the mid 1930s to the present. Nine vineyards were planted over a 67 year time span, and then the next ten years saw 20 more vineyards planted.

The growth that has occurred in the last 10 years in the establishment of wineries and the opening of cellar doors is shown by the fact that prior to 1993 there were 10 operational wineries and 10 cellar doors for wine sales. Since 1993, 10 new wineries and 19 cellar doors have opened for sales. There were three wineries unsure of the year that the winery was opened but they knew that it was after 1993. Six of the vineyards that have cellar doors, send their grapes to wineries to have them processed into wine.

The graphs on the following pages show the vineyard planting dates (Figure No.6.8), through to the opening of the wineries (Figure No.6.9) through to the cellar doors opening (Figure No.6.10) for wine sales.

Figure No.6. 8

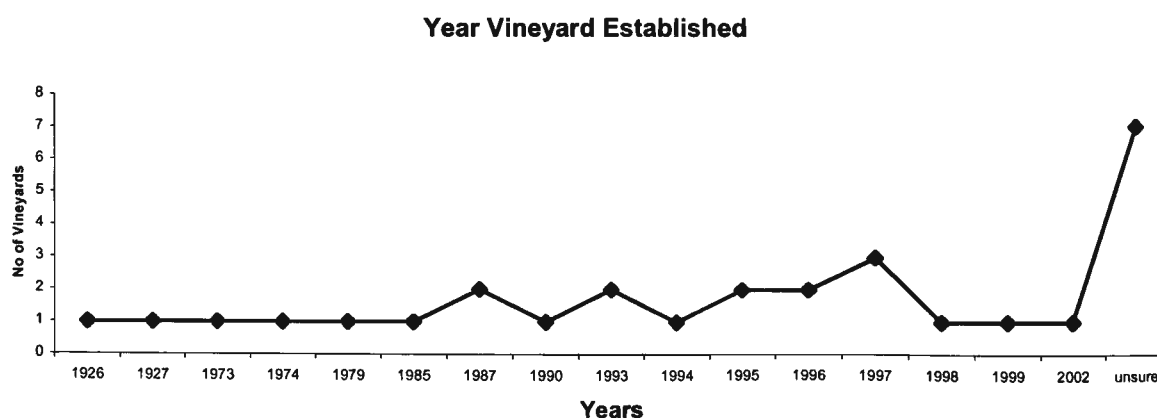


Figure No.6.9

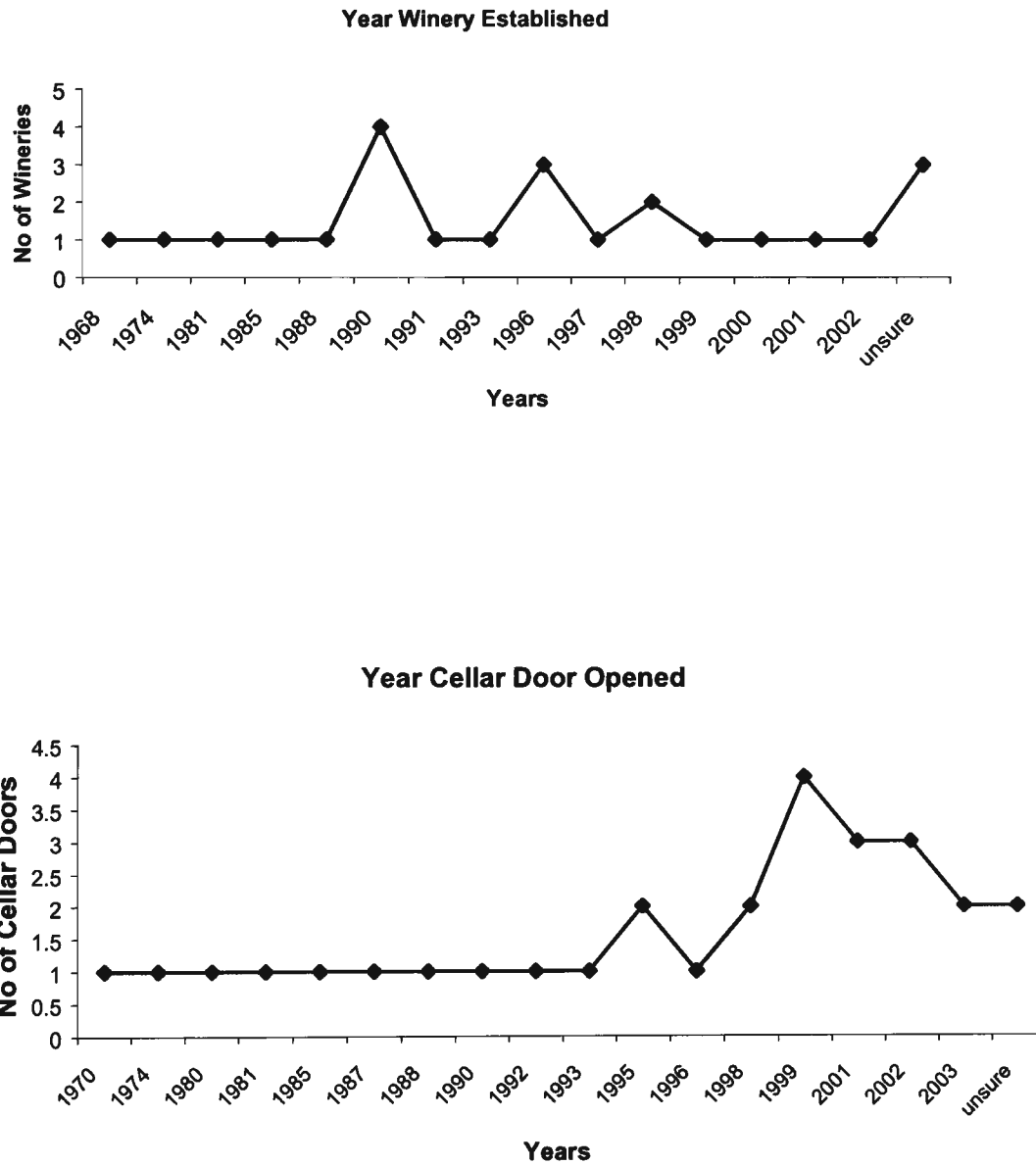


Figure No.6.10

The vineyards planted in 1926 and 1927 were not registered until the late sixties and early seventies. Wine was produced and sold to the North Queensland cane field workers. This was a practice that happened but was not actually recorded in official government

documents at the time. Most of this wine was made from table grapes. Other wines made were for family consumption.

The analysis reveals that there has been growth of vineyards at a steady pace. There appears to be no continuity between the dates of planting the vineyard and the opening of the cellar door. Cellar door openings were scattered over many years, but since 1998 have been consistently opening. Between 1998 and 2003, 14 cellar doors have opened. The impact of these openings has meant a major increase in cellar door numbers, currently forty, with expectations of growth in 2004. With this massive recent growth, one would have to question whether the number of wine operations has sustainability.

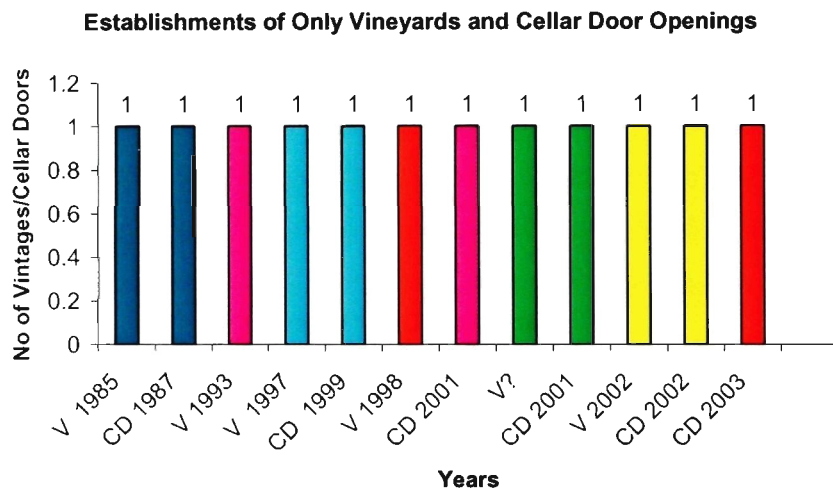


Figure No.6. 11

Legend for the above graph – V is for the planting of the vineyard and CD is for the opening dates of the Cellar Door and there is matching colors for V and CD.

In Figure No 6.11, one can see that the vineyard establishment dates and then the cellar door opening dates on many are within expectations of normal grape growing times and then to have the wine processed, but the yellow vineyard and cellar door are within the same year, 2002 for both. This vineyard did not utilize contract grape growers, therefore the owner has either minimum knowledge on planting dates, or has confused harvesting with planting.

Of the six vineyards that had a cellar door but no winery, most stated that they were looking at opening a winery and processing their own grapes to make wine, but the cost at the moment could not justify the returns. This way they only had to tend to the grapes, the harvest and then the cellar door sales. Long term they would invest more into their establishments, short term they would continue as they are. The long and short term time frames were not defined. In many ways, these operators are working in their specialty areas and looking at the sustainability within their business before taking of any more commitments.

Value Adding

Question 8. Do you grow the grapes for your wine and/or do you contract others to grow the grapes?

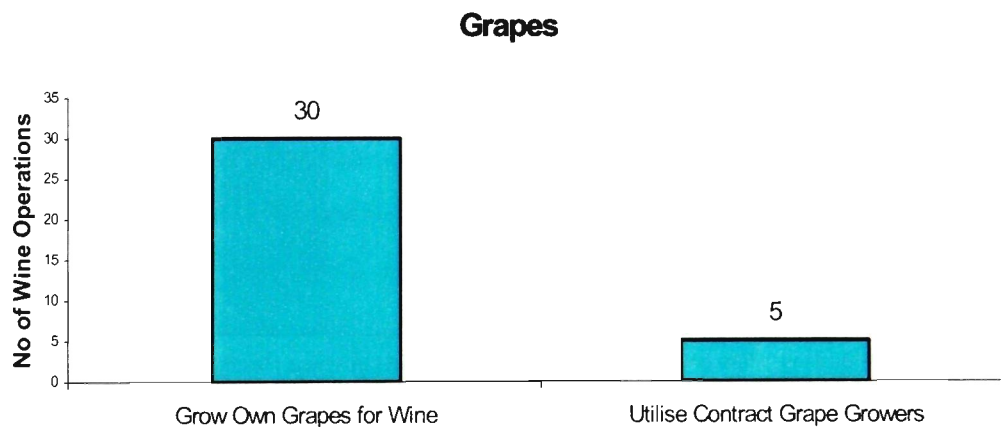


Figure No. 6.12

All thirty wine operation managers interviewed grow their own grapes, but five also bought grapes through contract grape growers. Many of the wineries made comments about grapes being brought into the Granite Belt to be made into wine. Comments such as, “Are the grapes grown in the Granite Belt region? If not, are the wines really from the Granite Belt or just made here?” There appears to be dissatisfaction between the wine operation managers with regard to where the grapes are grown and if the grapes are

mixed with the local grapes. These fall under the ‘Branding’ issues of the local area – labeling of the wine bottles. The Branding issue is based on the premise that in each region bottles are locally labeled and reflect the character of the region.

Contract grape growing falls also under the issues of, are the vineyards of the cellar doors large enough and/or do these particular cellar doors sell more wine than they can produce? The other issue has been the drought in the region, some vineyards may have required extra grapes to fulfill their normal orders, and these vineyard owners may only utilize contract grapes when required.

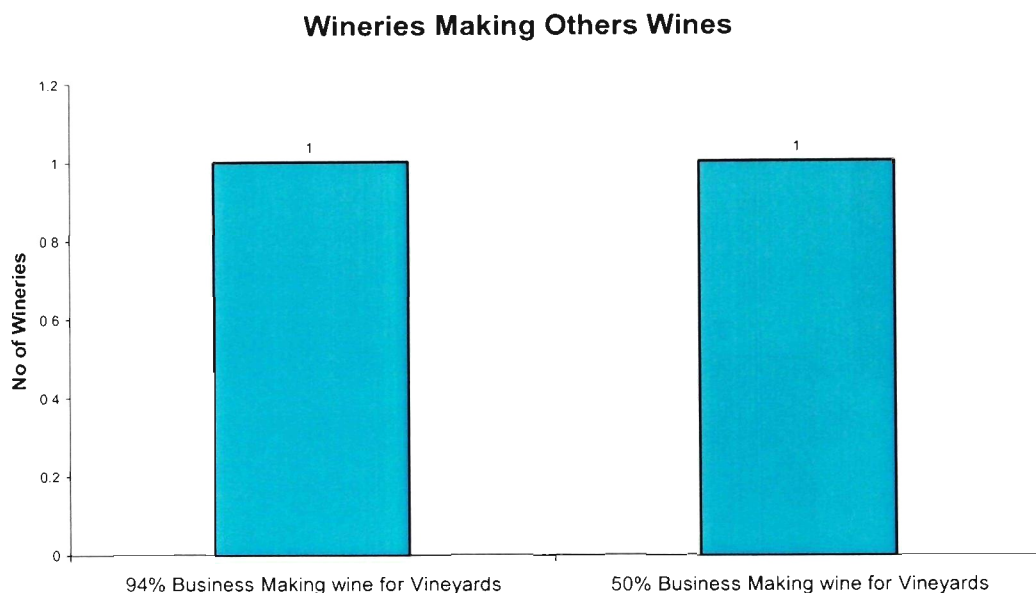


Figure No 6.13

This then leads to more questions from some of the cellar doors. Two wineries on the Granite Belt that were interviewed, make wines for others. Both wineries make wine for their own labels, but 50% of one winery business is making wine for others, whilst for the other it is 94% of their business. Then there is another issue where grapes are sent from the Granite Belt vineyard over the border to New South Wales, made into wine by other wine makers, bottled and then sent back to the Granite Belt cellar door for sale. Questions were raised in regards to grapes grown on the Granite Belt and then processed

in other regions, what should the label read and should this have the brand of the region identified on the label? The 'Branding' issue is about a region getting known for its wines, the full process of growing grapes through to the processing of wine and then to the tasting of the wines and their sales. The principle behind this is that when a region becomes known for its wines, and tourists associate the wines with the region, visitors come just for wine tasting and extra sales and revenue from the cellar door eventuates. From grape growing, through to processing, the above two wineries have value added as wine processors in the region.

Question 9. Does the operation/s have café, restaurant, accommodation and cellar door available?

Of the 30 wine operations, some have value added to their wine operations. Nine (30%) wine operations have coffee and light refreshments available, these wine operations felt that the driver, the non-drinker, and perhaps even the wine taster would like something other than wine. Eight (27%) wine operations have cafes/restaurants; these cater from light refreshments through to full meals. Some of the above are included in the fourteen (47%) wine operations that are open for dining by appointment. This dining by appointment is for functions, special occasions, such as the Brass Monkey season (winter in June, July and now August), and bus/coach tours. Only five (17%) of the wine operations have accommodation directly associated with their winery. Even though the wine operations are fairly close together, there are only a few forms of accommodation within the area. Most of the accommodation is centrally situated in the township of Stanthorpe, and numerous camping grounds in the National Parks, but these camping grounds are some distance from the wine operations, meaning you would always require a driver and/or some means of transport with a driver. There are Bed and Breakfasts and Cottages throughout the district, but rarely are they concentrated in the areas of the wineries.

Figure No 6.14 shows the breakdown of the value adding to the wine operations.

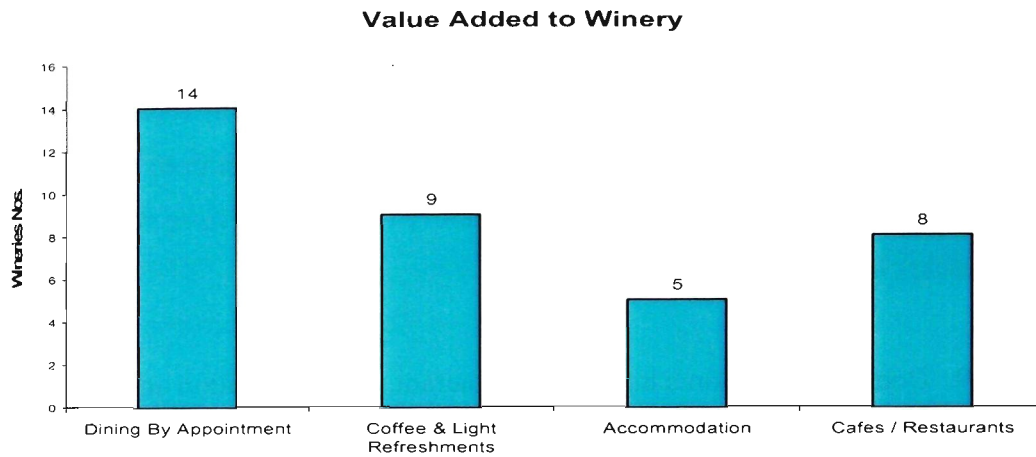


Figure No.6.14

Within the tourism, hospitality and the wine industry, there are seasonal times of the year, the highs and the lows within business. During the busy seasons on the Granite Belt, accommodation, cafes, restaurants are normally fully booked. The value adding can be challenging for economical reasons, and having to maintain these services in the off seasons, but only a minority have had the foresight to invest in enhancements for their wineries. This long term planning is a way of working towards sustainable alternative revenue for the business.

Staffing

Question 10. Do you employ staff especially to deal with the tourism side of your business? If so, how many people are employed?

Value adding at the wineries leads to staffing issues for the wineries. The majority of the staff are family members, but other staff are employed on either a permanent, casual or as needed basis.

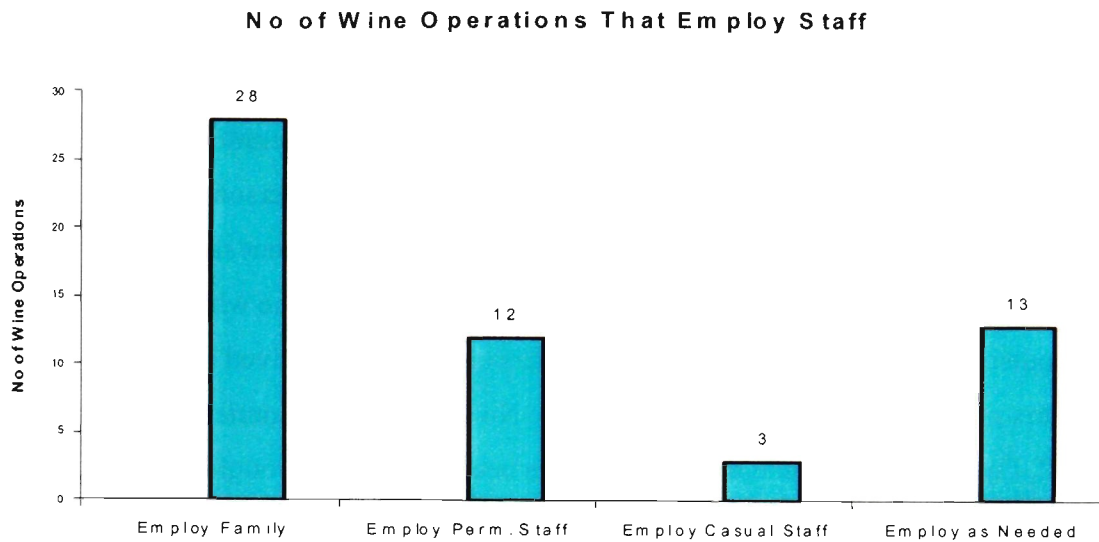


Figure No.6.15

Figure No 6.15 demonstrates that the family are the main employees for the vineyards, the wineries and the cellar doors. Twenty-nine operations' main employees are family, twelve operations have permanent staff, three operations have casual staff, and thirteen operations employ casuals on an as needs basis. The figure above shows how many wineries actually employ people.

Due to the small operations most staffing requirements can be maintained through the family. In most cases, the family live at the winery, therefore the family can operated the business and it also can give employment opportunities to the next generation, the learning through working. In some wineries, the business has been brought for a change of occupation, a change to their way of life. Therefore the family has brought the establishment as a job. As stated before, many of these wineries have not added any extra services to their establishments, therefore staffing requirements are minimal. Also there is the extra expense of employing outside the family, with the associate costs, such as superannuation, taxation, and workers compensation, these quickly amount and the smaller establishments give the impression that meeting these costs could be difficult.

Figure No 6.16 below shows the actual permanent numbers of employees within the wine operations. Of the thirty-four permanent employees, one winery employs five people to work within the vineyard and winery. In most cases of wine operations, family members were employed as permanents, whether as cellar door tourism personnel and/or wine makers or vineyard workers. One winery employs nine permanent staff, six of these are family members and three are from outside the family circle. One winery is fully operated by outside employed staff, no family members are actually involved in the day-to-day affairs of the operation. As shown in Figure No 6.16, twelve wineries employ permanent staff, three casual staff and thirteen casual as needs require. Throughout the thirty operations, five operations have most of the permanent and casual staff, the other seven operations have on average 2 permanent staff. One must remember that even though the operations are mainly family businesses, these are self-employed people working in their various occupations within a diverse industry. One thing is clear from this survey, the local wine industry is not a major employer in the area.

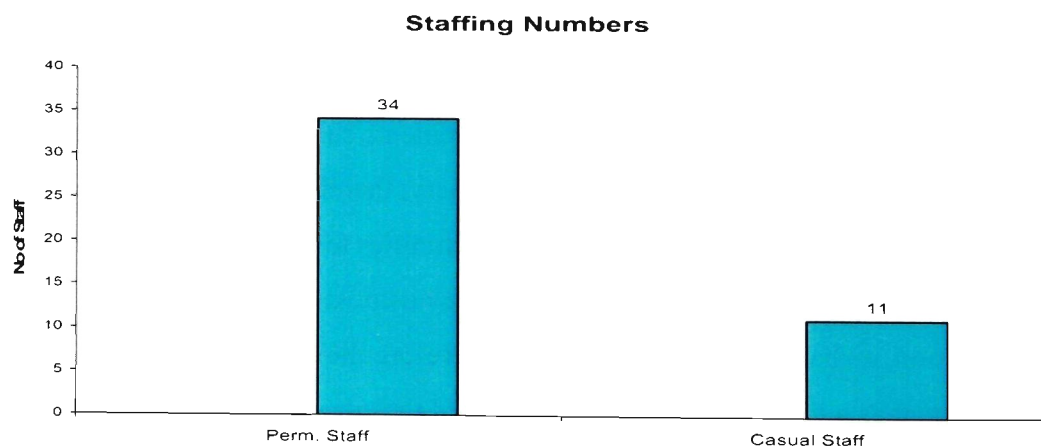


Figure No 6.16

Wine Sales

Question 11. How does wine tourism impact on your business? eg % sales at the cellar door.

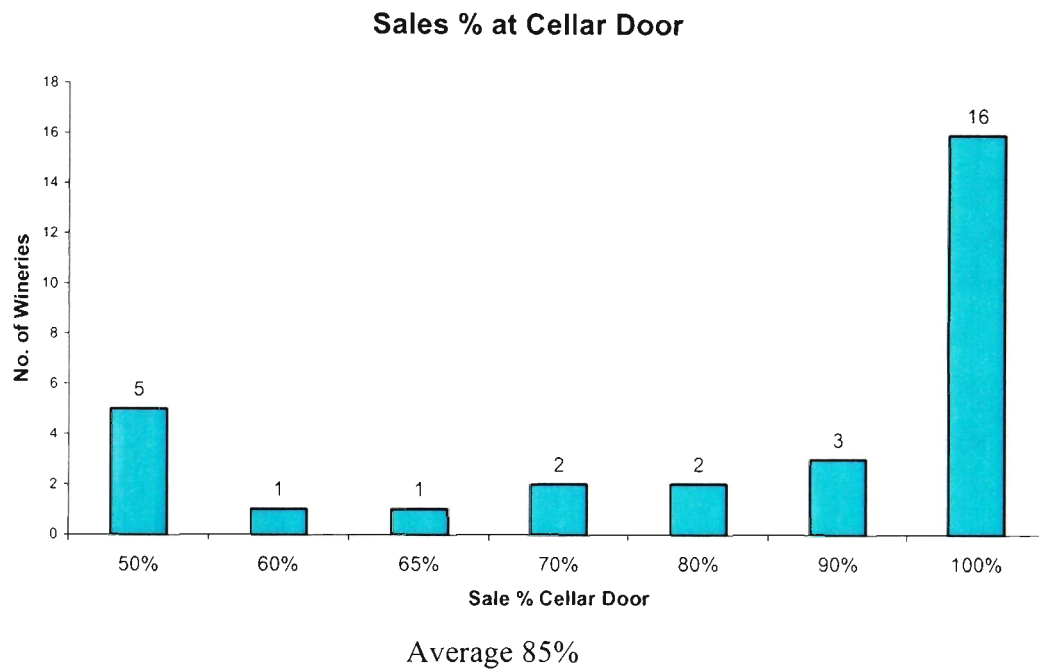


Figure No 6.17

Cellar door sales represent a major proportion of the revenue for wine operators. The revenue percentage, when averaged out for the thirty cellar doors, is 85% of all sales. This means that wine tourism accounts for an extremely large proportion of wine businesses. An interesting point of note is that the one winery not open to the public, sells all its wines at a cellar door in another location.

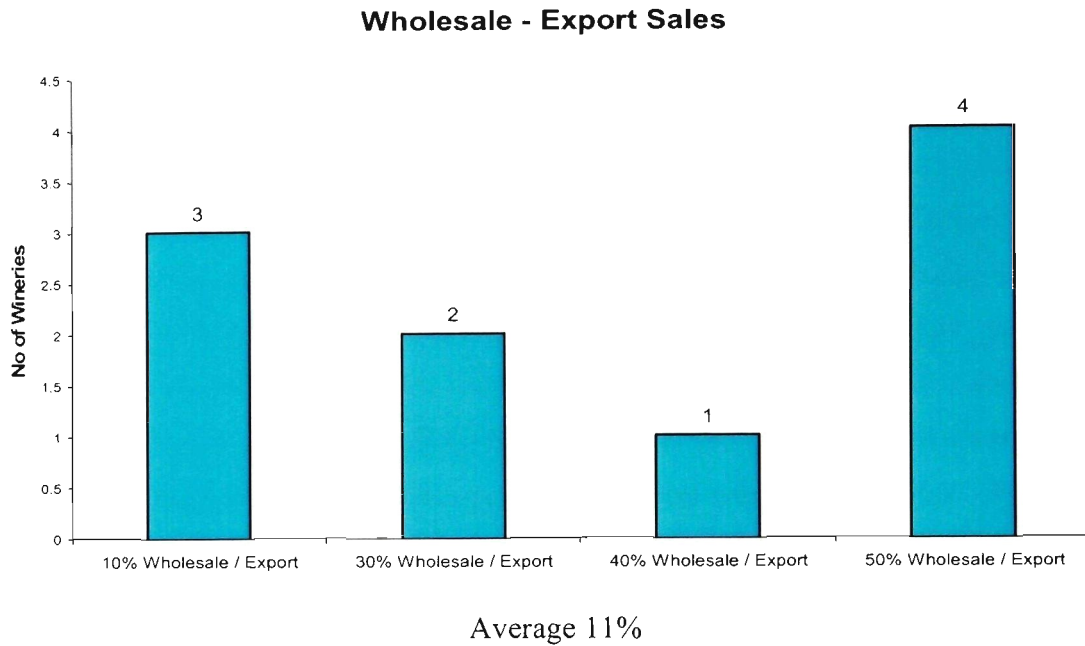


Figure No 6.18

The next largest section of wine sales is wholesale and export, this accounts for an average of 11%. Wholesale and export sales are of relevance for only ten operations. The smallest section of wine sales for the operations is mail order, email order and special order. This section of sales accounts for an average, over the thirty operations, of approximately 4%. Mail orders and special orders are in fact an extension of cellar door sales, as these are repeat customers ordering more. Tourists who enjoyed the wine and/or experience of a particular cellar door order from a distance instead of revisiting the cellar door. Special orders can be for special labels on particular bottles of wine, for family celebrations, for weddings and for numerous other occasions.



Figure No 6.19

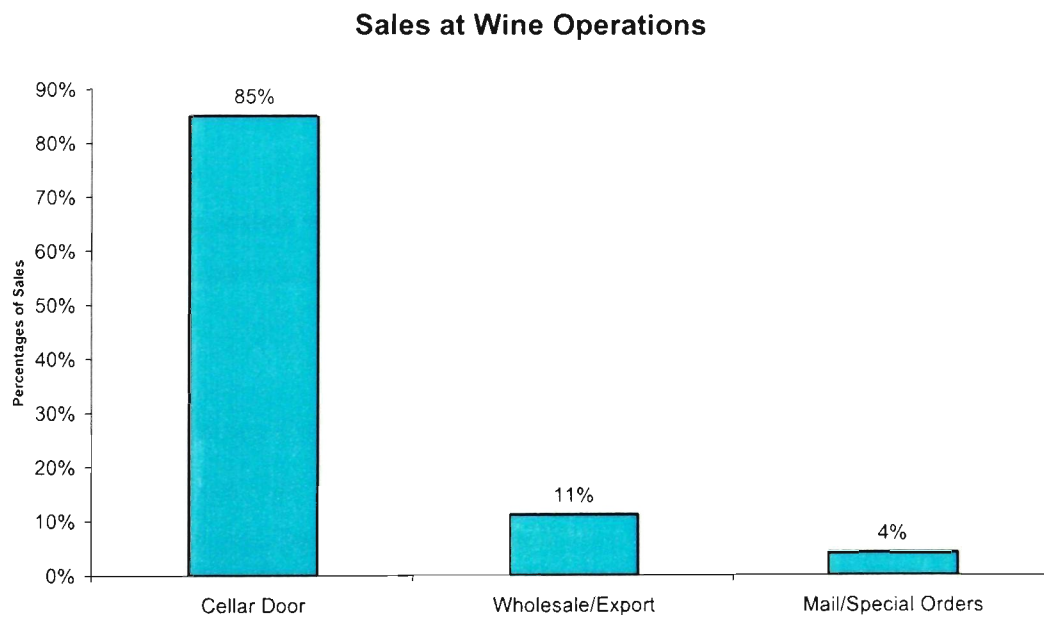


Figure No.6.20

Figure No 6.20 shows the sales of the wine operators divided into their sales outlet.

Figure No 6.20 demonstrates that wine tourism should be one of the main focuses of the wineries. As the cellar door sales are on average 85% of the winery's revenue, then it would be logical in business to take wine tourism extremely serious and focus within this area.

Wine Tourism

Question 12. How do wine operators feel about wine tourism?

Twenty-nine (95%) operations felt that the region had potential in wine tourism, one cellar door was unsure. It is to be expected that as significant revenue comes from tourists coming to the cellar door, tasting and buying wines, the wine industry would be looking seriously at the potential of wine tourism and how the area can be grown to enjoy more business.

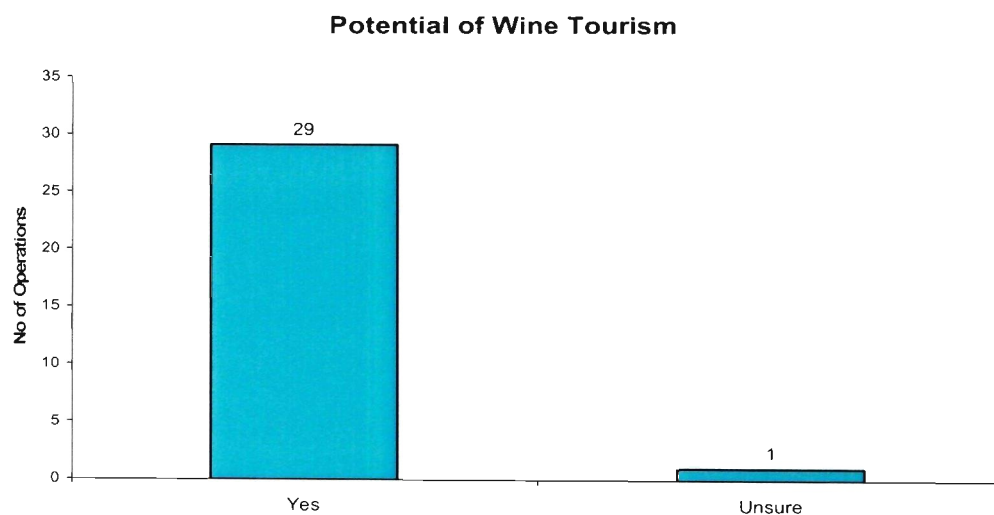


Figure No.6.21

Question 13 Is wine tourism a major component of your business?

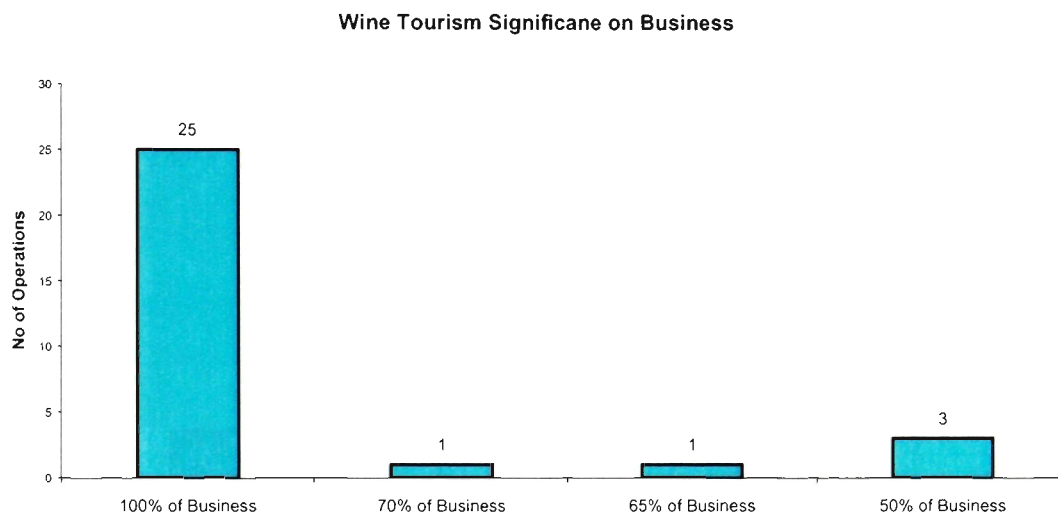


Figure No 6.22

25 wine operations stated wine tourism sales accounted for 100% of their sales, 1 wine operator thought wine tourism accounted for 70% of sales, 1 thought 65% and three at 50% of sales.

It is extremely interesting when one analyses the figures for cellar doors sales. Twenty-five operations stated that wine tourism was 100% of their business, three operations included email and mail orders within their figures to make the 100%. Even with mail and special orders, the average for non cellar door sales comes only to 7%. A number of the wine operators were very unclear on exactly what percentage of their wine was sold to tourists. The writer did re-ask this question and ask for clarification from numerous wine operation owners and managers. Figure No 6.22 shows the final information, as stated before, conflicting with the cellar door, export and wholesale, and mail order percentages and figures.

Operations Owned

Question 14 How many operations/businesses do you have? (businesses as in vineyards, wineries and cellar doors)

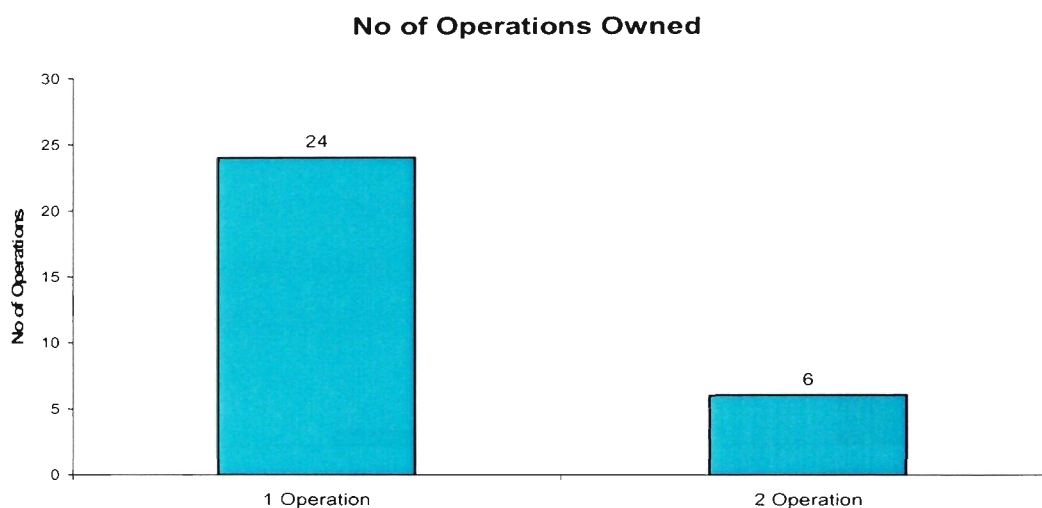


Figure No 6.23

Operations owned means businesses such as vineyards, wineries and cellar doors. This did not have any relevance to any other business that the operators may have. This question was only in relationship to businesses associated with the wine tourism industry. Twenty four operators had the one operation that was where the writer had interviewed then. Six operations had two operations in association to wine tourism and/or wine sales as shown in Figure No 6.23.

Of the six operations, they had focused on the tourist, such as satellite cellar doors. Two of these operations each had another vineyard with a cellar door attached and a restaurant/café at their cellar door. These vineyards are in two different regions, and their wineries are on the Granite Belt, this is one of the areas of concern for the “Branding” issues of the regions as mentioned earlier.

Question 15 What kind of operations are they? (eg. café, restaurants, cellar doors)

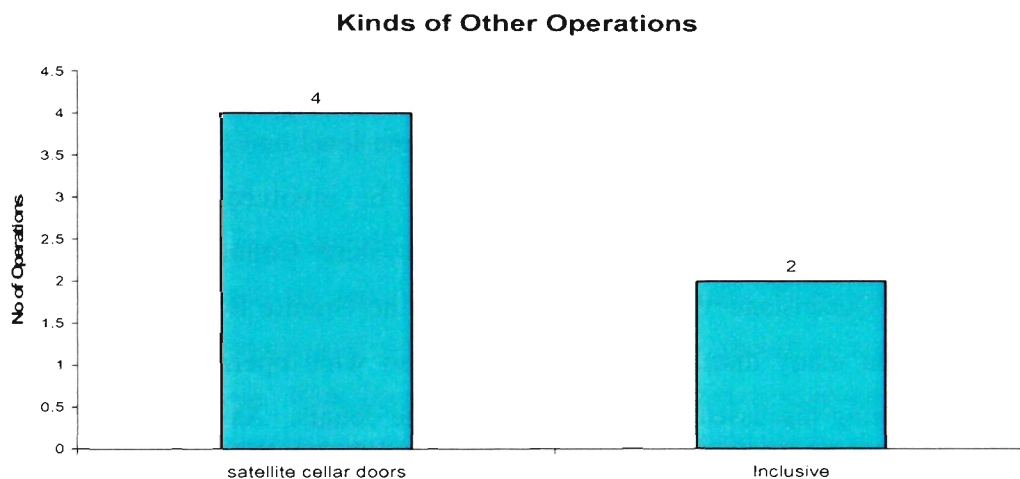


Figure No 6.24

As shown in Figure No 6.24, four wine operations (13%) had satellite cellar door sale outlets involving wine tasting and sales. Two wine operations (7%) had vineyards, with cellar doors and cafes. One of these operations has a restaurant and a function room that caters for weddings and parties. These two operations are looking across the region and working on wine tourism and how to sell their wines. Interestingly, the four satellite cellar doors, also have sales by wholesale and/or export sales. One could make the conclusion that twenty-four operations believe that the tourist should come to them to taste and buy their wines. As previously shown in Figure No 6.14 and written about in relation to value adding to the cellar door, there are only 14 operations (47 %) that have dining be appointment; 9 operations (30%) for coffee and light refreshments; 5 operations (17%) with accommodation and 8 (27%) with a café and/or restaurant. Are the twenty four operations (67%) interested in wine tourism or are they interested in just selling their wines and letting others look after the other needs of the tourists?

Wine Tourism Promotions

Question 16. How would you like to see wine tourism promoted? Who should promote this?

The local Granite Belt Tourist Association recently discussed the issue of different associations coming under one umbrella organisation. Each association at present does its own marketing and promotion, all similar yet vastly different. By pooling the fees for each different association membership, the whole region would benefit. The fees would be then calculated on the needs of the whole area. Many association members felt that all the fees that they were paying should stay at the same level and be used for the whole area. Some of the main associations that could be involved are the two tourist associations (Government and Granite Belt), the Shire Council, the Chamber of Commerce, the Queensland Wine Association, and the Granite Belt Wine Association. There have been many discussions on the topic, so wine operations had heard that changes were being discussed but were unsure of the details. As shown in Figures No 6.25 & 6.26 on the following page, are the answers to who should promote the wineries?

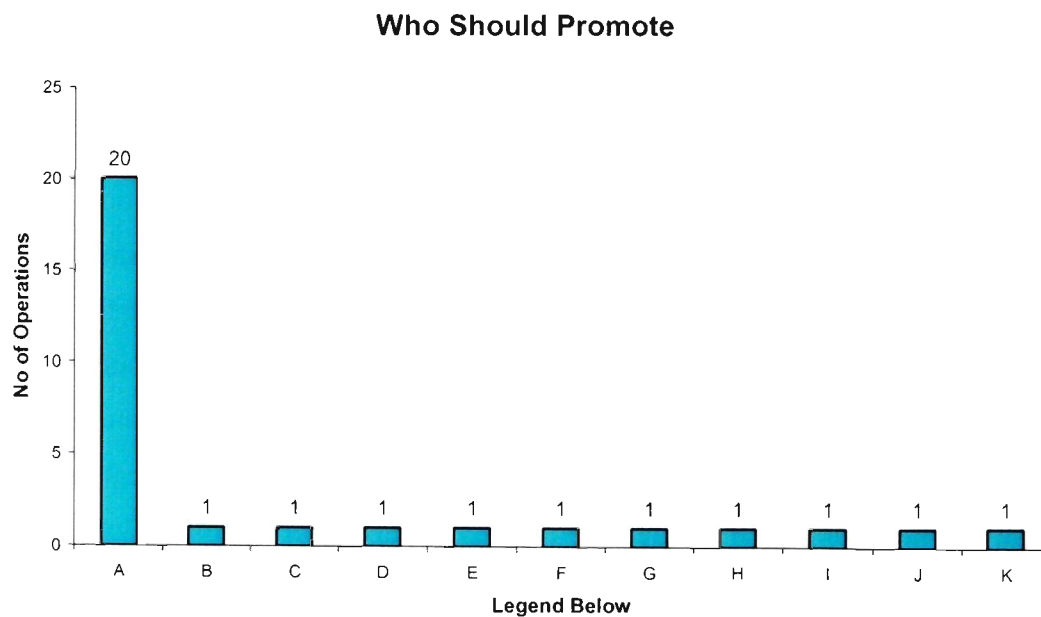


Figure No 6.25

A:-All associations within the region should combine together and promote the whole area; this includes

the Government (Tourism QLD).

B:-Government and individual wineries

C:-Both Tourist Associations and individual wineries

D:-All together – otherwise people pushing their own barrows

E:-Whole area to promote plus the individual wineries

F:-NSW & QLD working together; Australian Tourism; Regional Tourism Body – Tenterfield and Stanthorpe as one. Professional staff paid to do job; local tourism

G:-Government Departments for Tourism need to be involved in promoting the whole area.

H:-Everyone

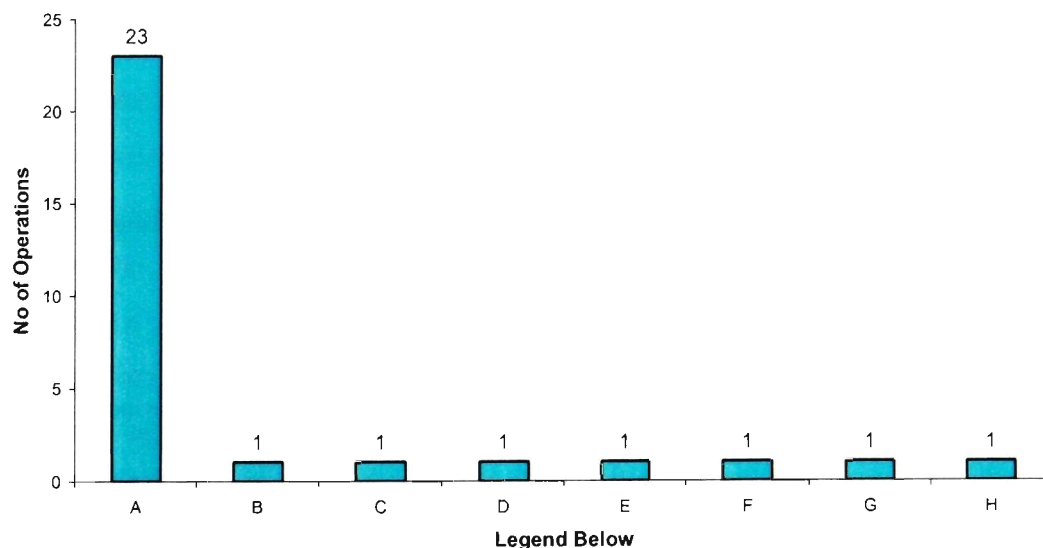
I:-No comment

J:-Does not affect us here

K:-Individual wineries

Of the thirty wine operations 66% agree to who should promote wine tourism for the region, as can be seen, the other 34% are scattered with many different ideas. Twenty three (79%) of the thirty wine operations interviewed agreed that the associations should be combined and work together for the whole area. With this promotions area, it was also recommended to have at least one full time permanent staff member to co-ordinate the promotions, and for this person to have a professional marketing and promotions background. Seven wine operations (21%) had varied ideas.

Similar for Promotions



Figures No 6.26

A:-All associations within the region should combine together and promote the whole area; this included the Government (Tourism QLD).

B:-Government and individual wineries

C:-Both Tourist Associations and individual wineries

D:-NSW & QLD working together; Australian Tourism; Regional Tourism Body – Tenterfield and Stanthorpe as one. Professional staff paid to do job; local tourism

E:-Government Departments for Tourism need to be involved in promoting the whole area.

F:-No comment

G:-Does not affect us here

H:-Individual wineries

How Wine Tourism Should Be Promoted

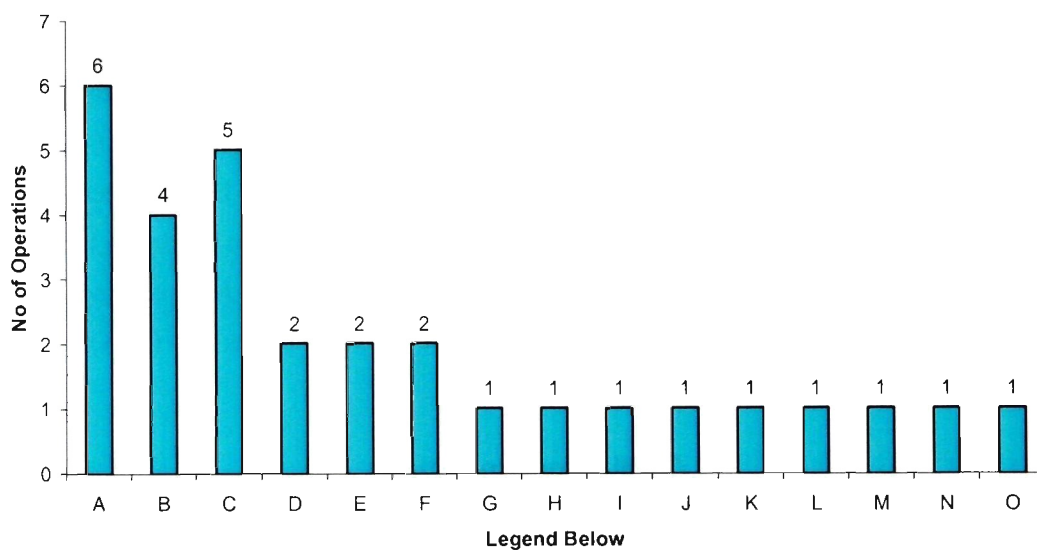


Figure No 6.27

A:-Whole area to be promoted – Government Bodies and Wine Industry

B:-More basic promotions – Brisbane; Gold Coast and Sunshine Coast. International visitors – conducted tours – direct marketing.

C:-Positive and professional marketing and promotions for the whole area

D:-Television: Brisbane; Gold Coast and Sunshine Coast and the Courier Mail

E:-By education; specialist events; focus on tasters; vineyard tours; more promotions on wines

F:-By promoting all wineries; even the smaller ones

G:-Individual wineries with brochures

H:-Big marketing section: re-inventing the Granite Belt; fresh produce; old fruit shops to be re-opened; arts and crafts; jazz; operas; musicals

I:-Fair bit of promotion due to 2 Tourist Associations – Wineries do own promotions; Bottle Shops and

distribution in Brisbane for tourist to get to know the product.

J:-Promoting the point of difference: not a normal QLD experience; level above sea

K:-The area – the whole picture of the wine – grapes growing; making the wine and then tasting the wines; experiences; presenting wines; presenting wine tastings; and the information correct

L:-Just promoted – quality wines; maps and brochures that are correct

M:-Wine Australia and Shows

N:-Week end destination; wineries working together

O:-Regional – whole area and what it has to offer; branding of the region and the wines and the fresh foods.

The wine operators have particular ideas on how the industry on the Granite Belt should be promoted. The Granite Belt Tourist Association has discussed marketing and promotions, but as can be seen from this research no two operators can agree on the way forward. It is interesting to note that two wine operations wanted the wineries promoted and marketed, yet stated “even the smaller ones.” It was a consistent theme from many of the wine operators that since they were smaller, their wine operation was over looked for marketing and promotions by any association.

In the promotions and marketing question, there were many different suggestions given to the writer on why other wine operations were busy and they were not, and why they were missing out on the tourist trade. It was never the actual wine operations fault or their problem, but the belief was that various businesses were working together and excluding certain wine operations. The writer held general discussions with all the wine operators in the area and this issue did come up with most wine operators, either as a problem or as to what the wine operation had done over the years to achieve the current outcome. The bottom line comes down to individual wine operations marketing and pushing their product so that their label becomes better known and then they actually have more wine tourists to their venues. These wine operations were the most professional and looked at their operation as a business, open when advertised, added extra value, and tried to cater for different age groups, making the wine tourist remember and enjoy the experience of their venue.

Signage

In marketing and promotions, comments were made in relation to signage of the area. “It would be nice to see the correct information on brochures and in maps of the area.” Signage of wineries was another point that the wineries felt needed to be looked at. Instead of a bunch of grapes on the sign on the road, it could include wine operations name/s on that particular road and also further signage along the way to the wine operations, as many wine operations are back a few roads from the main highway. At present wine operations have their own signs out on the highway and this in many cases looks professional, but in some cases, not so professional. The answer would be to create a professional standard appearance for the region and the branding of the wines within this region.

Tourist

The writer did not survey the visitors/tourist, this information was collected from the wine operators who appeared to have limited knowledge of their clients.

Question No 17. Who are your clients? Age, profession, couples/singles, and gender.

Twenty five wine operations stated that the gender mix to their establishment was equal, and at four wine operations it was stated that they were mainly females. The four wine operations that have more females than males, vary in their mix from two females to a male for two wine operations, to three females to one male for the other two wine operations. This appears quite different in that twenty five wine operations have an equal gender mix.

Gender of Tourist to Wineries

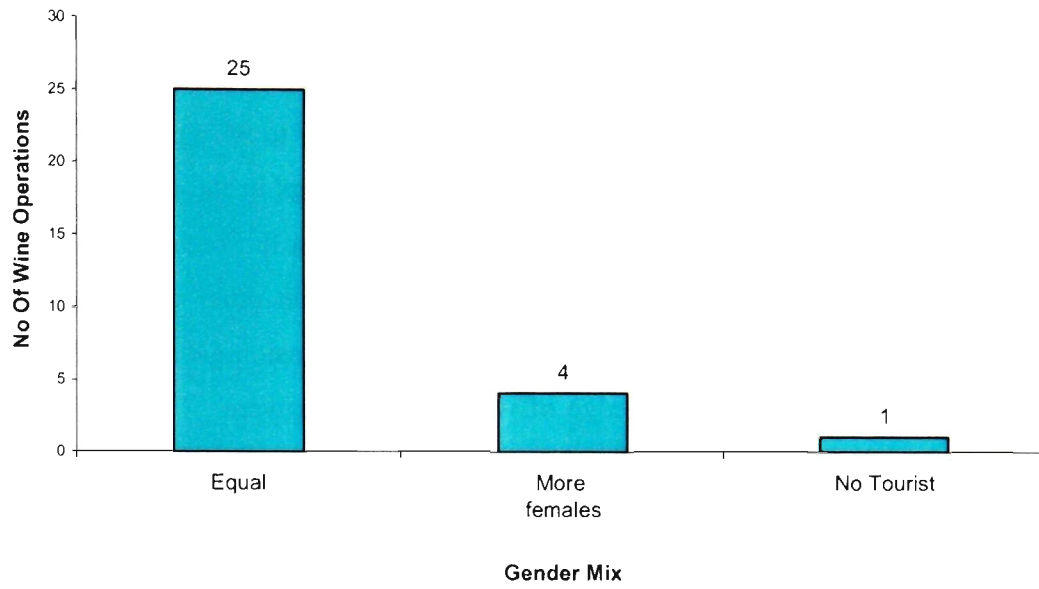


Figure No 6.28

Visitors

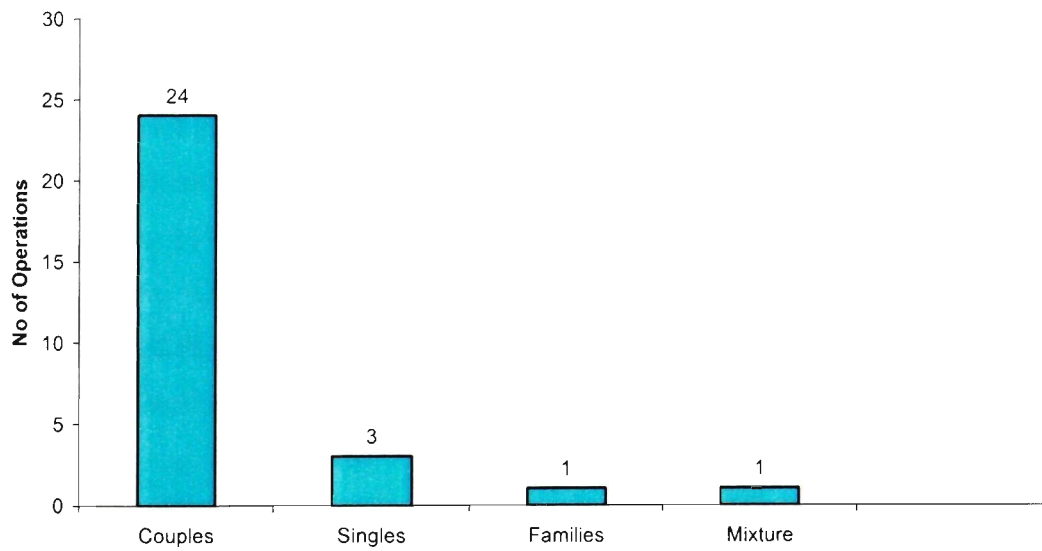


Figure No 6.29

There are twenty four wine operations (80%) that have mainly couples, three that have mainly singles (10%), while only one wine operation that has mainly families (3%), and one operation that has a mixture (3%). Seventeen wine operations (57%) have a general mixture of age among their wine tourists. Three wine operations have mainly 30 to 50 age group as their wine tourists, 4 wine operations have the 25 to 40 age group and 5 wine operations have the 40 to 60 age group. The age groupings in the data collection were of great interest. Only four wine operations actually have a full break down of the age groupings and percentages for different age groupings, eight other wine operators stated the average age or the age from years to years. The impression given was that the wine operators had very limited knowledge of who their clients were. Figure No 6.30 leads to questions of, do the wine operations know who their clients are? Are the wine operations targeting particular age groups or is it whoever turns up?

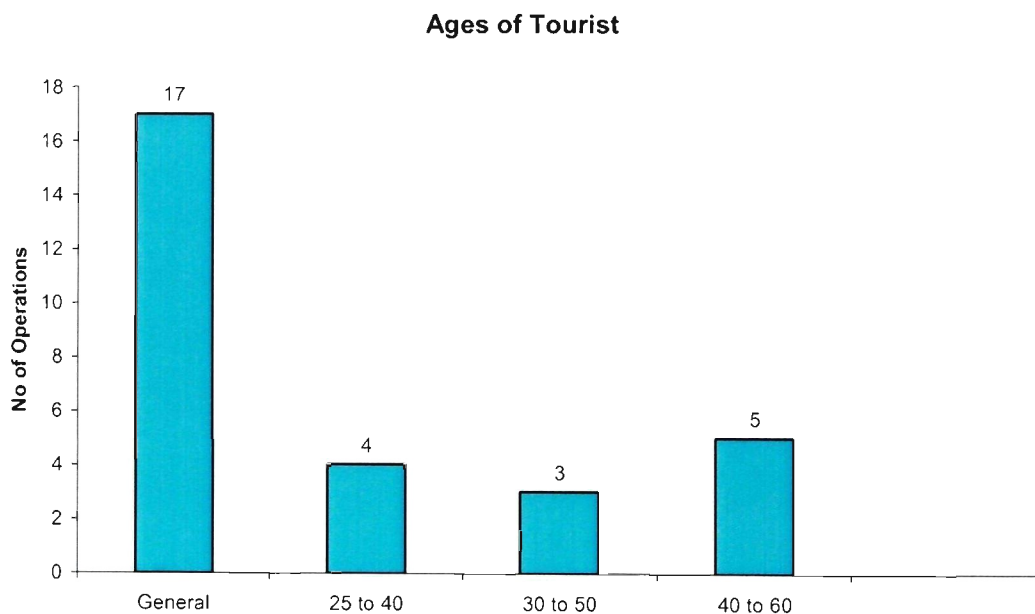


Figure No 6.30



Figure No 6.31

The following information was given to the researcher, but the wine operators could not justify their answers, other than stating that they speak with their clients. Within the thirty wine operations, twenty one (70%) have a mixture of tourists from various occupational backgrounds. Two wine operations (7%) have what they call ‘normal and blue collar workers’ – (could get no clear clarification of what a normal worker was), five wine operations (17%) have mainly professionals such as doctors and lawyers, in their stream of client. One wine operation (3%) had mainly junior and senior managers that visit their establishment. When asked how they knew the different occupations of their tourist, the answer was that people told them in conversation, or they could tell what the tourist did for a living. The writer feels that the wine operations just normally generalised the tourist to the mixture of occupations, as they were unsure of their clients.

With the wine tourist, the wine operators have no clear or recordable way of saying how many tourists walked into their establishment on any day. Four wine operations (13%) had a visitors book, but this was only used if the tourist wished to write something in it, like comments, and where from. The main recording for some of the wine operations

was if a tourist bought wine and enjoyed the experience and the tourist was asked if they would like to be on a mailing list for newsletters and/or mail order wines, new releases of wines and special events and functions. This does not mean that all tourists leave their names and addresses. Sales appear to be the guiding factor as to how many tourists, and what kind of day, week, or month a wine operation has had. This would be a difficult way to operate a business.

Figures Nos. 6.32 & 6.33 were not part of the questionnaire; twenty six wine operations (86%) made further comments about their backgrounds prior to going into the wine tourism business. With Figure No 6.31, a family member could be a wine maker, but it was stated that this was a family business and they were originally from a family business. The professional and retired professionals were doctors, lawyers, senior public servants and others from similar professional backgrounds. There were only three wine operations that stated outright that they were wine makers by profession and trade. Two started as fruit farmers, and then made the change, and there were two which came into the wine industry due to the lifestyle.

Wine Operations - Backgrounds

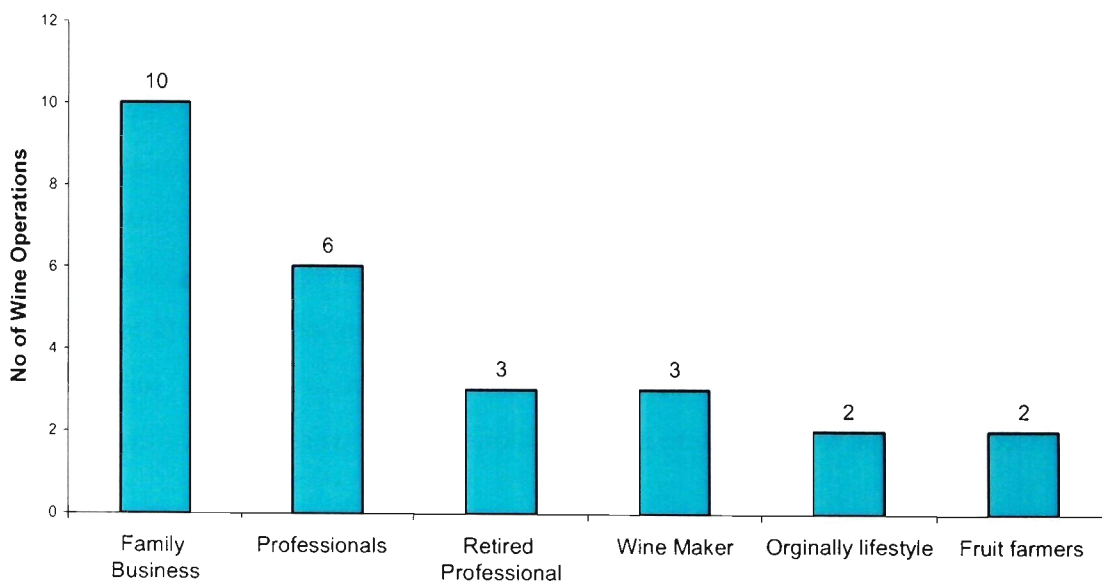


Figure No 6.32

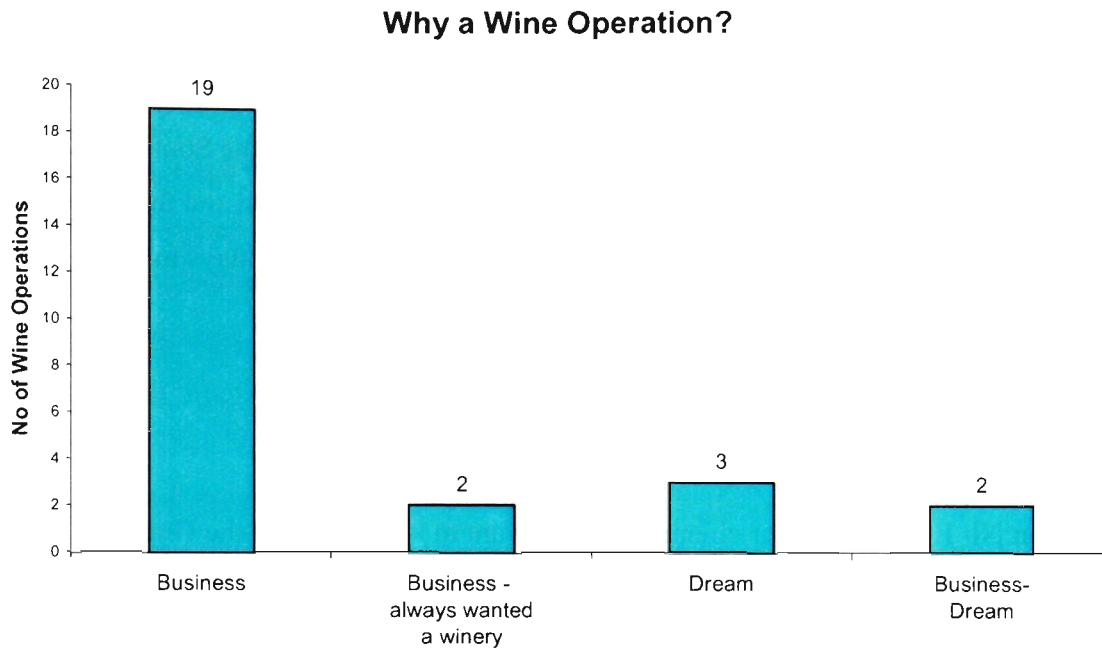


Figure No 6.33

The wine operators continued to discuss why they chose the wine industry and wine tourism? Nineteen wine operations (63%) stated it was a business, even though many stated the business was a life style choice, wine and business. Two wine operators (6%) stated they wanted to go into a business but they always wanted a winery, therefore they combined the two, and three wine operators (10%) stated this was their dream, and the other two wine operators (6%) stated it was a business dream. One wine operator stated that he retired to this way of life, but it was not what he expected and was selling due to the work load and lack of returns in the investment. In reality 63% of the wine operations were commenced as a business and the rest was for lifestyle. With so many wine operations and more to open in the new year, how are the wine operators being promoted and marketed by the tourism industry?

TOURISM

Of the three tourism association managers that were interviewed, the answers to the twelve questions were very similar, the only real difference was that the Southern Downs Tourist Association (SDTA) covers more than the Granite Belt region and therefore they promoted many areas, many different venues, tourism events and holidays in adjacent regions to the Granite Belt.

Question No 1. What do your clients normally want to see and do on the Granite Belt?

All areas are promoted within the region, whatever the client asks about, that particular area is promoted and explained. The difference between the two tourist associations is that one is more flexible than the other. One will only promote a venue if a paid member of the organisation, where as the other will promote the venue if a member or not; if not a member then the promotion given is limited. The reason given is that the whole area needs to be promoted and if a tourist wishes for something that you know personally, why not let them know. This is being a professional and if the wine operation/business asks where the tourist received the information, then the possibilities are that the wine operation/business may become a member.

Question No 2. Do you recommend any particular area (clarify) of tourism to your clients?

The answers were similar, all areas of the district are promoted equally, as per question one, if you are a member. Nothing is singled out, but the SDTA also promotes other areas, other districts, therefore if a person asks about something other than the Granite Belt, this association can provide answers about other regions.

Question No 3. Could you please rate the top 5 things (areas – activities) that you promote within the area?

All three stated that the following list was in no particular order of rating. Wineries and cellar doors were promoted, as well as the national parks, dams and wild life, the accommodation houses and the restaurants. This all depended on the season and what was happening within the district at that particular time of the year, such as Red November, the wine festivals, Brass Monkey season, and different sporting events.

Question No 4. What would you like to see improved in local tourism?

This question had a more interesting and political response than the previous answers. One organisation would like all the associations to work together and promote as one organisation. Within this answer, the amount of money that the Government gives the other tourist association each year was disclosed, and what the local region could do to promote the region if this money was spent in other ways. It was suggested that a marketing strategy for the region could be one major continuous promotional stream, better tourism information and correct tourism information to be given to the tourist. For improvement of local tourism, correct business practices were required. If you advertise that you are open, then you are open to the hours that are advertised. If you state that you do something in particular in your tourism business, then do this, not just for the larger numbers, but also for the smaller groups that come in.

The other answers to this question were that local tourism is being promoted, but one must remember that they are promoting a wider region as well as the local region.

Question No 5. What is the average length of stay of your clients visiting the Granite Belt that you deal with?

All three interviewees stated that the general tourist came to the region and stayed maybe one or two nights as the norm.

Question No 6. Do you see wine tourism as a potential area of growth?

All three interviewees could see the potential in wine tourism within the region. It was interesting to note that one association was well aware of all the wine tourism conferences within Australia, whilst the other association was only aware of what was happening in Queensland, in particular the conference in Toowoomba with the State Development Department.

Question No 7. Do you know what numbers/percentage of the visitors that you deal with are Intra-State, Inter-State, International?

The answers were the same. If anything one association gave more information, and appeared to be more aware of what was happening within the district. Intra-state, Queensland tourist to the region accounted for 95%, Interstate, Victoria was approximately 2.49%, and New South Wales approximately 2.5% and then the International tourist, these were mainly from New Zealand, America and Europe 0.01%. It was interesting to also note that no Asian tourists were within these percentages.

Question No 8. Would you like to see wine tourism grow?

All interviewed stated a firm yes. The reasons were all economical for the region, employment and cash flow for the towns. Also the wine industry could grow, and with this increased wine tourism there could be other industries that could be created, more restaurants and accommodation houses, many different areas could open up within the region.

Question No 9. Does wine tourism affect your business?

The three interviewees stated that all tourism affected their business, but one interviewee stated that wine tourism was a major part of their business. In many ways, people came to the region for wine tourism, the wine festivals, the climate, the difference of the area

from other areas within Queensland. Comments were made that even if a person or group of people go to the national parks for camping and the bird and wild life, they always seem to visit at least one wine operation.

Therefore, wine tourism works with many different forms of tourism, it enters into many different areas, and has the affect that if a person is in an area, they may as well go to one of the many wine operations.

Question No 10. What percentage of your business is related to wine tourism?

This answer was vastly different. Once again it was stated that all tourism is related to the business and wine tourism was asked about a great deal within the region, but it was only one section. Whereas the other association stated that wine tourism was a large percentage of their business, and the affects on other tourism venues was quite positive due to this.

Question No 11. Of these tourists what is the general age, occupation, and gender?

For all organisations the answer was the same, a mixture of gender and ages.

Occupations was an uncertain area, no one seemed to want to try to guess anyones occupation.

Question No 12. How long have you been in the tourism business?

The answers given were eight months, one year and five years. Then we went to extra comments, and these were about promotions within the region and all the associations going under one umbrella.

Key Findings

In terms of wine tourism on the Granite Belt, it appears that people have chosen wine tourism as a:-

(1) Lifestyle choice, this was stated at numerous wineries. The wineries were operated as wineries and had opened for tourist since it suited them, extra revenue, the hours suited them. This attitude has created a lack of professionalism with some of the staff and the families within the wine tourism sector in the Granite Belt region. The majority of wine operations had no idea of what the tourist expects, let alone how to give the tourist a meaningful and pleasurable experience, the experience the tourist takes back to wherever they live and talk to others. A concern by the minority was that tourists leave the area with a negative attitude due to the lack of professionalism of some of the wine tourism operators.

A wine training centre is to be opened in Stanthorpe at the start of 2005, a vineyard has already been planted, and some wine has been made. The proposal, for this wine training centre, was submitted in October 2003, as part of Stanthorpe State High School, wine tourism is extremely important to the community, the Government and the wineries. The training centre is to be a tourist attraction as well as a learning environment. It is to be a combined educational and community centre of wine excellence.

Recently a wine training meeting took place at Stanthorpe State High School to discuss the needs in training within the wine and tourism industry. It was interesting to note that not many wineries were represented at this training meeting. A comment was that training was being discussed for the converted, it is the others that are not present who need to listen to this.

(2) The majority of wine operators have a limited knowledge of tourism operations. The writer has concerns that wine tourism operators (cellar door personnel) appear to know only their wines, and in some cases, the knowledge of any varieties of wine was extremely limited.

(3) The majority of the wine operations are professional bouquet wineries. The majority of these winery operators are not people that have been trained in the area of tourism, nor do they employ tourism trained staff. Of the thirty wine operations interviewed, only one third of these wine operators had professional cellar door tourism/hospitality people. The majority of the people interviewed have no idea of the fundamentals of tourism and hospitality, as the following paragraphs demonstrate.

There is a lack of professionalism in relation to opening times, which could be regarded as false advertising, and show lack of business and legal knowledge, as well as, the lack of professionalism in opening with no one in attendance (went to the wine operation twice, same thing no attendance). The writer has since spoken to both locals and tourist, this is apparently a common occurrence.

The lack of correct attire when dealing with the public, no major standards required, but not dressing gown and slippers. Public expect standards, in a rural area, a relaxed casual dress code, not sleep wear.

As the writer journeyed through the region, the writer heard a number of complaints, from both the tourist, and the locals who were taking their visitors to the wine operations. The usual complaints were; we wanted to try other wine operations but they were not open but the brochure said they were; there was no service, the person was not interested in us; the person only knew about their wines, in some cases the knowledge was extremely limited, we helped them out; the knowledge was there on the wines but no knowledge of the grapes that made the wine.

(4) That the majority of wine operators in the Granite Belt region have done none or limited market research in wine tourism and are lacking in knowledge and experience of what a tourist wants and expects. A number of questions were answered during the wine operations interviews with the answer unsure of date, unsure of whatever. Knowledge of the establishment by both the owners and the employees is an important issue with the tourists, the questions asked in the interview were normal questions that a tourist would

ask at the cellar door. If the personnel don't care, or give the impression of not caring (unsure of basic answers), and their employers have not given the relevant information to the staff members, what memorable experience is the wine tourist going to take away? Of the thirty wine operations interviewed, only eight operations showed any ability of basic hospitality to the writer, only three offered a glass of water or a cup of tea or coffee.

(5) The majority of wine operators have none or very limited knowledge of other wine operations in the area. Lack of product knowledge, lack of area knowledge, and some wine operations had no knowledge of what other wine operations produce. The writer was also informed by some locals who had taken visitors to wine operations, that they were asked why they came to their wine operation. This was a normal question, but when answered, the wine operator went on to explain about the promotions and marketing of the region and how they were always left out. The wine operations need to give the impression of working together, at least give the tourist this impression. Many of the wine operators are working against each other and promoting a negative and destructive image to the tourist.

(6) It is obvious that the wine operators have no true and consistent knowledge of their clients, it is what they remember of the day perhaps the week. This was clearly demonstrated within the structured interview, and the fact that no true records, not even a visitors book is kept for all the clients/tourists to sign, therefore being able to know at least the district that the tourist comes from. How many visitors do they receive through their cellar door each day, week, month, what day is the busiest for wine tasting?

Some of the wine operations wish to mirror the Hunter Valley, whilst others wish to keep the rural country charm of the district. There are only four wine operations that seem to have kept the family in mind, this meaning children travelling with adults. Children seem to be a forgotten area for the wine operations, the expectations seem to be to cater to the more mature clients without children or the younger couple who have not had a family as yet. This is a huge market that only four wine operations feel that needs to be catered for.

Another section that has not been considered by any of the wine operations is the disabled wine taster, or the disabled family member. The wine operations have the legal requirements for physically disabled people but these have been thought of as a second thought. Most access is from the rear of the premises, travelling over grass and uneven surfaces.

(7) Little true knowledge of what the age groups are of their clients, their working backgrounds, their gender, these all enhance upon the spending knowledge and also marketing ability. As with question number 4, there has been no market research. If the wine operators were aware of their clients, then it would be made easier to market and promote wine tours and tastings.

(8) The Granite Belt wine operations have no apparent standards as an industry, such as in benchmarks in regards to wines and wine tourism service. Wine tourism requires service, if the wine is not of the best quality, many tourists can overlook this if the service is good. The service can become the memorable experience.

Only two wineries focused on the problems of tourists that visit the district. The first being the times that shops are open within the district, they felt this was part of the service required from the wine operators to allow the tourist the correct information. If you are doing a wine trip and staying in a local cabin, all the shops on the weekend are closing at about 1:00pm at the latest on Saturday. This is a rural region and works with rural hours, there are very few small shops that remain open in the town that services the region. Therefore the operators working in tourism always have to remind the tourist about what they require to bring to the area, for example, food is required to be packed by the tourist as very few shops/petrol stations will be open when they arrive.

(9) The tourism and wine industry need to work together and have a closer relationship, including the sharing of knowledge of the district and wines, what is available to the tourist, and what the tourist expects from wine tourism. Limited knowledge and sharing taking place currently.

(10) The two tourism organisations are working towards similar goals, but this needs to be clarified, so that all industries can understand. The two tourism organisations have a different focus on tourism, and currently this appears not to be respected by other industries.

Ten important points that should be looked at, all could enhance and improve two industries, the tourism industry and the wine industry, as well as the regional community of the Granite Belt.

For wine tourism to succeed in the region known as the Granite Belt, it will need a lot of basic tourism and hospitality improvement. The wine operations have the wines to sell, but have forgotten how people wish to be treated. They are ignoring the basics of hospitality and reliability.

Having looked at the survey results in detail, this study will be concluded in the next and last chapter.

Chapter 7

Conclusion

Purpose

The purpose of this research was to examine the relationship between the tourism industry and the wine industry in the Granite Belt.

1. What is the role of the tourism industry in fostering the wine industry in the Granite Belt in Queensland?
2. Does tourism and wine have a symbiotic relationship and if so, is this Wine Tourism?
3. Does wine tourism take place on the Granite Belt?
4. Is the Granite Belt supporting the wine and wine tourism industries?

The tourism industry in the Granite Belt advertises and promotes the wine industry. This is promoted through marketing the whole region as one tourism concept. Both tourist associations support the wine industry, and wine tourism. One tourist association may only highlight and promote members wineries, while the other tourist association will promote all the wineries, both are promoting the area. Due to promotions within the area, most wineries do get promoted as the wineries are in close proximity to each other. Both tourist associations look at wine tourism as a positive for the region. The two tourist associations are striving to have more tourist visit the area, whether this be for wine tourism or for other forms of tourism. The two tourist associations' look at the benefits for the whole region, this incorporates employment, the economical benefits that can be achieved in all areas from increased numbers of tourists.

Tourism and wine do have a symbiotic relationship, what helps one, helps the other. The wine industry attracts wine tourist that normally will visit other tourist attractions when in

the region. The tourist industry has many different attractions for different tourists, these tourists normally visit at least one winery within their stay in the region. With tourists visiting the wineries, sales are happening and with the wine industry being in the region, there are tourists that visit the area for the wine experience and this benefits all sections of the community. The wine industry and the tourism industry both benefit from each other and have an interwoven and symbiotic relationship.

Wine tourism does take place on the Granite Belt. The region has wine festivals, special wine dinners, brass monkey months that incorporate the experience of cool winter nights, food and wine. The majority of the wine tourism has been led by the wine industry with assistance from the community and other businesses. Wine encompasses a large portion of tourism on the Granite Belt, and the wineries do work with the other tourism venues, whether these be natural and/or man made, as they all enhance and compliment each other.

The wine and wine tourism industry is supported by the Granite Belt community. As the wine operations have tourists, this being wine tourism, and covers the areas of the sales of their wines, their added value services within the wineries, the benefits that flow on to the wider community is quite extensive. Some of the benefits to the community are employment, such as tour guides, bus drivers, accommodation and restaurant employment, which in turn has economical benefits for the whole community. The majority of the community are extremely supportive of wine tourism. With the support of the community, and looking to the future, the new Wine Tourism Training Centre is expected to be operating in July 2005. This training centre has been embraced by the community, as the community can see the benefits for the future in wine, wine tourism and in training in this growing area. The community, the wine industry and the tourist industry are expecting that wine tourism in the future in the region will grow, and the expectations are that wine tourism will become one of the major industries on the Granite Belt.

This study now proposes future directions in tourism relevant to the wine operations, thus developing further the concept of wine tourism. If both industries work closer together, this will create a flow-on effect to rural communities and increase regional tourism in many parts of the world.

Recommendations

1. Signage

Better signage of the wine operations on the roads, full details on the names of the wine operations on a particular road and what distance this wine operation is away from the main road. Large detailed maps on the roadside showing where the tourist is and where the wine operations are from that point. Wine operations to be consistent with opening times and days, following advertised standards, if you advertise that the wine operation is open, then it should be.

2. Education and Training

With the Wine Tourism Training Centre attached to Stanthorpe State High School to be opened in the next few years, training for wine tourism personnel is required now, as well as in the future. All the wine operations family members and employees must work together and to have good local and area knowledge. The personnel of the wine operations must not only know about their wine operation but also have knowledge of the other wine operations, which would assist the tourist and show an overall interest in the region, as well as appearing to be working together. The wine operations personnel must have general wine knowledge to assist the tourist, from grape varieties through to how the wines are made.

3. Value added for the wine tourism experience

An area that all those interviewed mentioned needed attention, were more 'styles' of restaurants and cafes, a variety of cuisines to choose from, and open during non-business hours. With the current restaurants and cafes, the opening and closing times should be considered for the tourist industry as well as for the local population.

4. Increased market share

A problem that could be occurring presently is the number of wine operations verses the number of tourists that the region can currently accommodate. With forty wine operations in the district open in 2003 and still more to open in the near future, this creates a competitive market, all the wine operations competing for the same tourist. Currently this is happening, and the problem is that many wine operations are only getting a few wine tourists throughout the week. Therefore the promotions of the district and what the area has to offer, and working together is going to be of high importance.

5. Better wine tours

Wine tourism is based and remembered on the experience at the cellar door. This can be enhanced by guided tours and personal and professional service at the cellar door. From the tasting of the wine through to the final departure, must be a positive experience so that the tourist leaves and tells others, but always remembers that particular wine operation.

6. Catering for the non wine tourist

Families are a forgotten area with wine tourism; only one wine operation stated that most of their clients were families. This is an area for tourists that could be promoted thereby increasing the numbers to the region. If the region was promoted, families would have different areas of interest and all could be worked together for a family weekend and/or holiday.

7. Marketing Organisation

The recommendations for this wine tourism area of the Granite Belt are that all associations and wine operations work together and promote the whole district. They must learn what the region has to offer and learn about each other's operation and what each has to offer the tourist, with sharing of the strengths and working on the weaknesses to become strengths. They must have standards of service, friendly yet professional, dress standards and general training in tourism and hospitality.

8. A regional wine tourist centre

The Granite Belt wine region requires a wine tourism centre, displaying all wine operations wines and information about each wine operation. At this wine tourism centre, there must be an employed staff member who has specialised knowledge of the local area, wine knowledge and has visited each wine operation.

Limitations

The limitations to this research were that only thirty wine operations were involved in the whole survey whereas there are currently forty wine operations working in the district. The limited number of tourist association managers, this could have been extended to a broader area of tourism, but this would have moved some of the focus to the hospitality industry more than the tourist industry. The interviews had the limitation of being structured, therefore the information collected was the same for each interviewee and the structure actually, could have decreased some of the information that may have been collected.

Future Research

Further research that could follow from this research would be to look at families and wine tourism, and disabilities (physical and various other disorders) and wine tourism. Are these areas being catered for, or are they the forgotten tourist? Other research could be on how to promote and increase considerably the wine tourism industry on the Granite Belt?

The writer believes that the main focus for further and future research should be on the visitors, the tourists, who are they, where do they come from, what do they do, their age groups, their gender and what do they expect from the wine operations in regards to wine tourism in the Granite Belt region and the district?

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